



Australian Government

BSBLEG530 Apply legal principles in wills and probate matters

Release: 1

BSBLEG530 Apply legal principles in wills and probate matters

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 7.0.

Application

This unit describes the skills and knowledge required to prepare wills and probates, powers of attorney and other deceased estate documentation.

The unit applies to individuals who work under supervision, use legal principles and evaluate information from a variety of sources to provide support in a range of legal service settings.

Its application in the workplace is determined by the job role of the individual and legislation, rules, regulations and codes of practice relevant to different jurisdictions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1. Prepare to apply principles in wills and probate matters	1.1 Identify task requirements 1.2 Identify key wills and probate elements for analysis according to task and organisational requirements 1.3 Identify key provisions of legislation and common law, policies or procedures according to task requirements
2. Apply principles in wills and probate matters	2.1 Analyse legal matter relevant to corporation law according to task requirements 2.2 Evaluate information according to task requirements 2.3 Prepare deliverable according to task and organisational requirements

ELEMENT	PERFORMANCE CRITERIA
3. Finalise application of principles in wills and probate matters	3.1 Verify and review documentation with relevant organisational personnel 3.2 Amend and sign-off according to organisational policies and procedures 3.3 Store or despatch document according to task and organisational requirements

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Description
Reading	Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information
Writing	Uses clear, accurate and relevant language to organise and record information and complete documentation
Oral Communication	- Participates effectively in spoken interactions using appropriate language and features for each audience and situation - Uses active listening and questioning techniques to confirm and clarify understanding
Initiative and enterprise	- Adheres to organisational policies and procedures - Keeps up-to-date with relevant legislation, regulations and policies and considers implications of these when planning and undertaking work
Teamwork	Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role
Planning and organising	- Plans, sequences and implements tasks according to legislative and organisational requirements and specific instructions - Evaluates information to decide on relevance to situation

Unit Mapping Information

Supersedes and is equivalent to BSBLEG515 Apply legal principles in wills and probate matters.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG530 Apply legal principles in wills and probate matters

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Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply legal principles in wills and probate matters on at least four occasions.

In the course of the above, the candidate must:

- prepare to apply wills and probate principles according to task requirements
- apply elements of wills and probate principles to prepare a deliverable
- review and amend deliverable according to feedback from supervisor
- despatch deliverable according to organisational policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- scope of the job role in the context of legislation, regulations and codes of practice
- summarise the policies and procedures of the organisation for wills and probate matters
- contents and process to prepare documents required for task
- sources of instructions including testamentary, solicitor and deceased estate
- roles and responsibilities of parties involved in wills and probate matters
- forms, documents and annexures relevant to wills and probate.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- appropriate legislation and regulations relevant to wills and probate matters
- workplace policies and procedures and reference materials relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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