



Australian Government

FNSPRT301 Establish entitlements to an intestate estate

Release: 1

FNSPRT301 Establish entitlements to an intestate estate

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to interpret and apply intestate legislation and regulation, follow a professional code of conduct and seek specialist advice and resources when required.

It applies to individuals with good research and communication skills who determine entitlement to an intestate estate, including intestate succession, identifying next of kin and proving family entitlements.

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

Unit Sector

Personal trustee

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. Search for will	1.1 Conduct investigations to confirm that deceased died intestate 1.2 Obtain relevant affidavits to support application for administration 1.3 Prepare and advertise notice of intention to apply for letters of administration, if required
2. Determine intestate succession	2.1 Undertake genealogical research relating to estate and establish family tree 2.2 Analyse and confirm identity and rights of next of kin with verifiable documentary evidence

ELEMENT	PERFORMANCE CRITERIA
	2.3 Trace, identify and locate all beneficiaries 2.4 Prepare and approve schedule of beneficiaries and their entitlements

Foundation Skills

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

Skill	Performance Criteria	Description
Reading	1.1, 1.2, 2.1, 2.2	Analyses and consolidates information and data from a range of sources, against defined criteria and requirements, and checks for accuracy and completeness
Writing	1.3, 2.1-2.4	Accurately records information and prepares correspondence and documentation using clear language and correct spelling and terminology
Oral Communication	2.1, 2.2, 2.3	- Articulates clearly, using vocabulary suitable to audience to convey or request information - Uses listening and questioning techniques to confirm understanding
Interact with others	1.1, 2.1, 2.2, 2.3	- Identifies and takes steps to follow accepted communication practices and protocols - Uses a limited range of accepted practices for communicating in a work environment - Recognises common cultural and other differences of people in the work context and makes adjustments in addressing the differences
Get the work done	1.1-1.3, 2.1-2.4	- Plans and implements routine tasks and workload, making limited decisions on sequencing, timing and collaboration, and seeks assistance in setting priorities - Makes low-impact decisions within familiar situations, based on a range of predefined or routine solutions - Uses digital systems and technologies to access information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSPRT301 Establish entitlements to an intestate estate	FNSPRT301A Establish entitlements to an intestate estate	Updated to meet Standards for Training Packages. Minor rewording to clarify intent of performance criteria.	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSPRT301 Establish entitlements to an intestate estate

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Performance Evidence

Evidence of the ability to:

- conduct a search for a will complying with legislative, industry and organisational requirements
- document external specialists and resources contacted or used to establish entitlements to an intestate estate
- determine beneficiaries and their entitlements in accordance with legislative, industry and organisational requirements
- develop an application for letters of administration.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- summarise key requirements of relevant state and territory legislation and regulations relating to:
 - administration and probate
 - intestate succession
 - other related legislation
- outline the roles, responsibilities and powers of the personal trust officer including:
 - organisational expectations
 - limitation of personal authority
- discuss the professional code of conduct in the personal trustee sector including:
 - ethics
 - integrity
 - professionalism
 - confidentiality

- summarise techniques for liaising with key organisational personnel with expertise in specialised areas relating to the personal trustee sector
- outline relevant organisational policy and procedures in regards to establishing entitlements to an intestate estate.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the personal trustee field of work and include access to:

- common office equipment, technology, software and consumables
- the internet for searches.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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