



Australian Government

Assessment Requirements for FNSPRT311 Establish entitlements to intestate estates

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with the FNS Financial Services Training Package Version 8.0. Supersedes and is equivalent to FNSPRT301 Establish entitlements to an intestate estate.

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:

- establish entitlements to at least two different intestate estates according to legislative, industry and organisational requirements

In the course of the above, the candidate must:

- confirm deceased is intestacy
- locate and determine beneficiaries and their entitlements.

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:

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

- confidentiality
- organisational policies and procedures regarding establishing entitlements to an intestate estate.

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:

- office equipment, technology, software and consumables.

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

Links

Companion Volume Implementation Guide is found on VETNet -

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