



Australian Government

FNSPRT311 Establish entitlements to intestate estates

Release: 1

FNSPRT311 Establish entitlements to intestate estates

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.

Application

This unit describes the skills and knowledge required to establish entitlements to intestate estates according to organisational and intestate legislative requirements.

The unit applies to individuals who work as administrators in the personal trustee sector and 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 trustees

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. Confirm estate administration in intestacy	1.1 Confirm deceased died intestate according to organisational and legislative requirements 1.2 Obtain relevant evidence and affidavits that support application for administration in intestacy 1.3 Prepare and advertise notice of intention to apply for letters of administration, as 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 according to organisational and legislative requirements 2.4 Prepare and approve schedule of beneficiaries and their entitlements

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

SKILL	DESCRIPTION
Oral communication	Follows accepted communication practices and protocols and adjusts communication methods when presented with individuals with common cultural and other differences
Reading	Analyses and consolidates information and data different sources against defined criteria and requirements, and checks for accuracy and completeness
Writing	Records information accurately and prepares correspondence and documentation using clear language and correct spelling and terminology
Technology	Completes work tasks and provides information using the main features and functions of organisation-supported digital tools

Unit Mapping Information

Supersedes and is equivalent to FNSPRT301 Establish entitlements to an intestate estate.

Links

Companion Volume Implementation Guide is found on VETNet -

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

Assessment Requirements for FNSPRT311 Establish entitlements to intestate estates

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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:

- 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

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