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**STATEMENT OF RELEVANT WORK EXPERIENCE**

**Registered Probate Technician Application**

1. **TO APPLY**

CLC Legal Technician Register applicants must have successfully achieved:

* the CLC/SQA Diploma in Probate Law and Practice Level 4, or equivalent CLC accredited units; and
* **six months work experience** in relevant employment; in a probate or conveyancing practice, legal firm, or organisation offering probate services to the public.

**When submitting this form applicants MUST also provide:**

1. a certified copy of photographic ID, such as a Passport or a Photographic Driving Licence; and
2. all educational certificates and transcripts.

**Email your completed Statement and all supporting documentation to** [**traineelawyer@clc-uk.org**](mailto:traineelawyer@clc-uk.org) **and include in the subject heading of your email: Probate Technician Registration Application**

**2. FEES**

A one of life-time fee of £75.00 is charged. When your application has been approved we will send you an email containing a link to the automated web basket and instructions for how to pay. Payment can only be made by credit or debit card ONLY.

Once we have received your payment we will send you an email with your Probate Technician Reference Number. Technicians will be removed from the register automatically when they are approved for their CLC Qualifying Probate Licence and become Licensed Probate Practitioners.

**3. THE STATEMENT**

Submission of a signed statement evidences that you have been in full or part time, paid or un-paid employment assisting in the provision of probate services, supervised by an Authorised Person, i.e. a Licenced Probate Practitioner, Solicitor, or Fellow of the Chartered Institute of Legal Executives.

*This individual should be the accountable person overseeing the service provided to the public. It is not necessary for this individual to be a direct line manager.*

The CLC may as part of its standard application checks speak with Authorised Persons who have verified documentation.

**TECHNICAL PROCESS COMPLETED SATISFACTORILY**

**(RELATED TO NON-CONTENTIOUS PROBATE MATTERS ONLY)**

|  |  |  |
| --- | --- | --- |
| Acting under supervision | | TICK |
| 1 | Able to establish with the client(s) the legal service to be provided and give details of all associated cost(s) |  |
| 2 | Able to provide a client with an explanation of a Trust within a Will and the options available to Trustees |  |
| 3 | Able to provide advice to a client about the validity of a Will presented to them |  |
| 4 | Able to raise (standard) relevant issues about failure of gifts within a Will. |  |
| 5 | Able to provide (standard) advice on intestacy rules based and the likely impact on an estate where there are missing beneficiaries |  |
| 6 | Able to provide a (basic) inheritance tax computation based on information provided by the supervisor |  |
| 7 | Able to draft an Oath for submission of the Grant application |  |
| 8 | Able to draft a document such as a Deed of Appointment of a Trustee |  |
| 9 | Understands how to maintain transparent and comprehensive client files adhering to the CLC Regulatory Arrangements |  |
| 10 | Able to identify when a matter is unusual or complex and when is should be escalated to a more experienced colleague; including being able to identify in what instances the firm would need to cease to act e.g. where a conflict of interest arises |  |
| 11 | Shows awareness of risks to the client(s) and business arising out of probate transactions |  |
| 12 | Maintains and builds client relationships |  |
| 13 | Able to draft letters to clients and other third parties involved in a probate transaction |  |

**4. PROGRESSION ONTO THE LEVEL 6 DIPLOMA IN PROBATE LAW AND PRACTICE**

|  |  |  |
| --- | --- | --- |
| 14 | I intend to progress on to the Level 6 Diploma |  |
| 15 | I am currently studying the Level 6 Diploma |  |
| 16 | I do not intend to progress onto the Level 6 Diploma |  |

**5. DECLARATION (APPLICANT)**

I CONFIRM THAT THE DETAILS SHOWN ABOVE ARE COMPLETE AND CORRECT

|  |  |
| --- | --- |
| Applicants Name | (in Capitals) |
| Signed |  |
| Date |  |
| Preferred Email |  |
| Mobile Phone | \*note the CLC may contact you with updates by text to the mobile phone number provided |
| Date of Birth |  |
| If any of the above details change please let us know by email to [traineelawyer@clc-uk.org](mailto:traineelawyer@clc-uk.org) | |

**6. DECLARATION (AUTHORISED PERSON)**

I CONFIRM THAT THE DETAILS SHOWN ABOVE ARE COMPLETE AND CORRECT

|  |  |  |  |
| --- | --- | --- | --- |
| Authorised Person Name  [IN CAPITALS] |  | | |
| Signed: Date: | | | |
| Licensed Conveyancer  Licensed Probate Practitioner  Solicitor  FCILEx | | | |
| Licence or Practicing Certificate number |  |  |  |
| In what capacity are you verifying the applicant? |  |  |  |
| Work Email: Work Phone: | | | |

Please note.The CLC may as part of its standard application checks speak with Authorised Persons who have certified documentation.