



Proposal to develop an apprenticeship L6: Licensed Conveyancer or Licensed Probate Practitioner

Title of occupation

Licensed Conveyancer or Licensed Probate Practitioner

UOS reference number

ST1311

Core and options

Yes

Option title/s

Licensed Conveyancer

Licensed Probate Practitioner

Level of occupation

Level 6

Route

Legal, finance and accounting

Typical duration of apprenticeship

24 months

Is this an integrated apprenticeship?

non-degree qualification

Target date for approval

Thursday 31 August 2023

Resubmission

No

Would your proposed apprenticeship standard replace an existing framework?

No

Occupation Profile

This occupation is found in...

all legal firms that deliver conveyancing, and, or probate legal services and advice. Licensed conveyancers can work anywhere that deals with the transfer of a title to property or land in a legal department headed by a qualified person. The scope of employment is not limited to a law firm. They can work in housing associations, local authorities, banks and building societies to property development companies and even railways and airports. Licensed probate practitioners work in a variety of legal settings recognised in the private client industry, including regulated high street law firms and specialist probate providers. The role is varied as no two estates are the same.

The broad purpose of the occupation is...

to deliver legal services within conveyancing or probate as an authorised person under the regulation of the Council for Licensed Conveyancers. Licensed conveyancers are qualified, professional property lawyers who specialise in the legal aspects surrounding buying and selling property in England and Wales. A licensed conveyancer will ensure that all documentation, contracts and financial arrangements associated with buying or selling a property or piece of land are in order. They understand that each property transaction is unique and work closely with clients. Licensed conveyancers work with clients who are the buyers and sellers of property and often also a lending institution. The role is varied as no two property transactions are the same. The licensed conveyancer helps clients often at a stressful time so they must be able to demonstrate empathy and understanding. They will be responsible for work managing and guiding junior staff such as conveyancing technicians and paralegals. Licensed probate practitioners are qualified, professional probate lawyers. They specialise in the legal aspects surrounding inheritance and the administration of Wills and estates in England and Wales. Licensed probate practitioners are experts in the legal documentation and processes for dealing with the affairs of a deceased person ("estate"). They advise and draft wills and lasting powers of attorney. They liaise with the deceased's representatives to administer the estate in accordance with their will. When the deceased has not left a will, they work under the intestacy provisions. The licensed probate practitioner helps clients often at an emotional time and so must be able to demonstrate empathy and understanding. They must be vigilant to the needs and risks posed to vulnerable clients such as the elderly to ensure that their interests are protected. They will be responsible for work managing and guiding junior staff such as probate technicians and paralegals.

In their daily work, an employee in this occupation interacts with...

a variety of legal teams, stakeholders and settings. They deal with a broad range of private individuals, professional organisations or persons. These can include accountants, banks, local authorities, tax authorities, trusts, charities and property professionals.

An employee in this occupation will be responsible for...

work as principal fee earners. They have a significant level of autonomy and are responsible for compliance with regulatory arrangements and lender requirements. Digital skills are increasingly important as is a due regard for the security and sensitivity of client data. Licensed conveyancers and licensed probate practitioners need to understand their clients' needs so that they can give the most appropriate service in the client's best interests and in accordance with professional and ethical demands. They handle client monies and work closely with regulatory requirements to ensure that they provide an ethical service. Licensed conveyancers and licensed probate practitioners are also commissioners for oaths. This means they have legal authority to administer and witness official documents such as affidavits to swear that a statement is the truth. The Licensed conveyancing and licensed probate practitioner apprenticeship is one of several equivalent ways to qualify as a Licensed conveyancer or licensed probate practitioner and become an authorised person recognised by the Council for Licensed Conveyancers and Probate Practitioners (CLC)

Typical job titles

Licensed conveyancer

Licensed probate practitioner

Core occupation duties

Duty	OTJ Training (days)
Duty 1 work closely with third party stakeholders and other professionals to understand their technical legal requirements and provide excellent customer service for example, property managing agents, probate lawyers, mortgage brokers or land registry	15
Duty 2 provide ethical legal services ensuring high standards of client care ensuring they are acting in the best interests of the client	15
Duty 3 undertake professional case review of self and others to identify risks and recommend areas for improvement, remedial actions paths to progression and escalation	2
Duty 4 engage in identifying the limits of their personal professional experience and competence and escalate instructions that are beyond their scope of expertise	0
Duty 5 manage client and organisation data securely and confidentially in compliance with legislation	2
Duty 6 conduct all transactions with awareness of fraud including taking a defensive approach towards cybercrime	2
Duty 7 risk assess the impact of transactions on clients and other stakeholders to ensure compliance with legislation and professional standards including recommendations for the mitigation of risks	15
Duty 8 ensure all transactions are undertaken in compliance with Anti-Money Laundering regulations	2
Duty 9 undertake Know Your Customer activity comprehensively and with due diligence to ensure that the appropriate legal services are provided	5
Duty 10 lead case progression activity to ensure caseloads move with timeliness and with a view to commerciality	0
Duty 11 work closely with clients and third parties	4

providing excellent customer service

Duty 12 manage their personal and professional continuous development 0

Option duties

Licensed Conveyancer duties

Duty	OTJ Training (days)
Duty 13 provide conveyancing legal advice in connection with sale and purchase, re-mortgage or transfers of equity of residential property.	10
Duty 14 work closely with lending institutions to understand their requirements and provide excellent customer service	10
Duty 15 manage a case load of property and land transactions to demanding timescales including a range of types of property and land transactions such as freehold, re-mortgages and transfers of equity	5

Licensed Probate Practitioner duties

Duty	OTJ Training (days)
Duty 16 provide advice and drafting of Wills and Lasting Powers of Attorney to clients	10
Duty 17 provide advice to clients during probate activities and the administration of estates	10
Duty 18 manage a case load of drafting of Wills, Lasting Powers of Attorney and probate activities to appropriate timescales and quality standards.	5

Knowledge, skills and behaviour (KSB) categories

- Technical Legal

- Legal Administration
- Stakeholders and Communication
- Digital technology and security
- Data and Information analysis and handling
- Technical Legal Conveyancing
- Technical Legal Probate
- Professionalism and Ethics

Qualifications

Does the apprenticeship need to include any mandated qualifications in addition to the above-mentioned English and maths qualifications?

No

Professional recognition

This standard aligns with the following professional recognition:

- Council for Licensed Conveyancers and Probate Professionals for Licensed Conveyancer
- Council for Licensed Conveyancers and Probate Professionals for Licensed Probate Practitioner

Regulated occupation

Is this a statutory regulated occupation?

Yes

Name of regulator body

Council for Licensed Conveyancers

Typical entry point to the apprenticeship

Outline the typical entry point for the occupation. This could be in terms of job roles, qualifications, or experience. Or a mix of these.

Completion of the L4 Conveyancing or Probate Technician apprenticeship or Legal Technician L4 in development currently

Transferability

Explain how you will ensure this occupation is relevant to the range of employers who employ people in it.

This apprenticeship aligns to the CLC requirements as a Licensed Conveyancer or Licensed Probate Practitioner and is therefore transferable across any employer that recruits from the CLC

Typical number of annual starts

Enter the expected number of starts per year you expect on the apprenticeship. This should be for employers across England, not just with employers in the trailblazer group.

250

End-point assessment methods likely to be used to assess competence against the KSBs as a whole

Select the assessment methods you are likely to use in the end-point assessment

- Practical assessment
- Test / examination
- Discussion

Stand-alone occupation

Licensed Conveyancer and Licensed Probate Professional are distinct regulated occupations serviced by the Council for Licensed Conveyancers. Whilst some of the activities of conveyancing and probate can be carried out by unregulated persons, the scope and nature of those activities is limited if they are unregulated. This apprenticeship provides the opportunity for employers to train their staff in a regulated profession.

Employer directory

Have you nominated an organisation to appear on the employer directory for this apprenticeship?

Yes

Do you need grading exemption?

Yes

Please Provide evidence supporting your exemption request

The EPA will be regulatory aligned and there is no requirement for any grade above Pass to be recognised

Name of EQA provider

Where Ofqual or the Office for Students (OfS) is the external quality assurance (EQA) provider, use this form to nominate a sector representative organisation to apply to the directory of professional and employer-led bodies. The directory of professional and employer-led bodies consists of organisations that can further strengthen Ofqual or the OfS's EQA activity with genuine occupational expertise.

Ofqual

Progression Routes

ST0246 Solicitor L7

Supporting uploads

Transferability upload (job advert examples)

ST1311_proposal_transferability_Licensed Conv job Andrew Gordon.PNG
ST1311_proposal_transferability_Licensed Conveyancer Job HOMDEN.PNG
ST1311_proposal_transferability_Licensed Probate Job 10 pc group.PNG
ST1311_proposal_transferability_Licensed Probate Job Brooke Taylor.PNG

Standalone occupation upload

Is the occupation niche or emerging occupation?

No