

DEATH & TAXES COURSE PART ONE



Consultancy & Training

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Will Drafting – from start to finish 2 day course – introductory

Aim

This course is aimed at people new to Will drafting who are changing discipline and those who would welcome a basic refresher if they have not prepared Wills for some years. It is designed to look at good practice and procedure as well as incorporating issue of law. There will be opportunities to practice drafting skills and approach.

Outcomes

Participants will:

- Be able to set up and manage a Will file
- Have a series of checklists and questionnaires for use in the office
- Appreciate the draftsman's duty of care in Will drafting and how to ensure it is delivered
- Be able to draft Wills for a variety of clients
- Know of the available precedents & software for use in the office

Agenda

1. Taking instructions, professional rules and file management
2. Duty of care
3. Undue influence and mental capacity issues
4. Introduction to Inheritance Tax
5. Key elements of successful drafting
6. Specific clauses
7. Classic areas of construction

Throughout use will be made of case studies to enable participants to draft Wills for a variety of clients.

This two day course attracts 12 CPD hours
SRA CPD Provider reference no: BMP/LASK
ILEX: Quote Course code on ILEX log