



PROBATE PRACTICE RIGHTS

• *Become a Probate Practitioner now*



BENEFITS

Once you have been accepted by IPS you will be able to:

- Provide probate services without supervision.
- Get recognition of your skills and competence.
- Use the title Chartered Legal Executive Probate Practitioner or CILEx Probate Practitioner to demonstrate your competence to clients and colleagues.
- Apply to IPS for authorisation to set up your own business offering these services.
- Be part of a regulated community, ensuring your clients and you are protected by independent regulation.
- Be eligible for membership of a Chartered professional body.
- Be eligible to progress to become a Chartered Legal Executive lawyer, with further independent practice rights.

PROBATE PRACTICE RIGHTS

IPS has a qualification scheme to allow for a person to become a Probate Practitioner. Qualification will enable you to provide the full range of probate practice rights. Probate practice is a reserved legal activity that can be undertaken by authorised persons. The IPS scheme will qualify you as an authorised person.

Probate practice rights involve preparing any probate papers on which to found or oppose a grant of probate or a grant of letters of administration. They cover the England and Wales jurisdiction.

QUALIFYING FOR THE RIGHTS

Probate practice rights are awarded to practitioners who can demonstrate that they are competent. We will be assessing competence in probate, estate administration and will writing.



Competence covers knowledge, skills and experience. You will need to show the following:

- Knowledge of probate practice and wills & succession to honours degree standard or equivalent. You may have developed knowledge through your work experience to this standard in which case you can demonstrate this by completing five portfolios.
- Skills in legal research, client care and probate practice. You will demonstrate your skills by producing a log outlining your skills and producing supporting evidence. Alternatively you could complete a skills course that covers these skills outcomes.
- At least two years' experience in a probate practice which you will demonstrate by producing portfolios of three probate cases you have handled.
- You must also have demonstrable knowledge of practice management and accounts if you intend to practise in an IPS regulated practice. You can meet most of the competencies by undertaking courses in these areas. Details of courses that meet the competencies can be found at www.ilexstandards.org.uk

You don't have to be a member of CILEx to become an authorised Probate Practitioner with us.

APPLICATION PROCESS

You will have to:

- complete an application form for probate practice rights;
- submit an outline of your experience and knowledge;
- provide a log and supporting evidence demonstrating your skills;
- provide portfolios to demonstrate your experience; and
- provide evidence of your knowledge in wills and succession and probate practice either through qualifications or portfolios

Copies of application forms, details of fees and our guidance to applicants can be found at www.ilexstandards.org.uk

We will assess your application, which will involve having your portfolios and log books being sent off to external advisors for marking. The external advisors are experts in probate practice, client care, legal research, practice management and accounts.

Where you are assessed as having met the competencies we will issue you with a probate practice certificate.



MEMBERSHIP AND REGISTRATION

You can apply for probate practice rights while you are in any grade of CILEx membership. It is also possible to apply without being a CILEx member. When you are assessed as meeting the competence requirements you will be registered as a Probate Practitioner. If you are not already a member you can elect to register as a CILEx member at the same time or remain a non-member.

REGULATION OF YOUR LEGAL PRACTICE

You must deliver probate services through a regulated legal practice. IPS is a regulator for legal practices. Alternatively you may already work in a practice regulated by an approved regulator. Further information about legal practice regulation can be found at www.ilexstandards.org.uk





CILEx MEMBERSHIP

CILEx members receive the award-winning monthly CILEx Journal magazine, which includes up-to-date information on events, legal news, a digest of recent court decisions, legal vacancies and much more. Members also have access to a broad range of discounted services.

CILEx members are regulated through ILEX Professional Standards (IPS), which means that you will stand apart from non-regulated paralegals and be expected to uphold the CILEx Code of Conduct.

For further information about CILEx Membership call 01234 845777 or email membership@cilex.org.uk

CILEx

Founded in 1963 the Chartered Institute of Legal Executives is the professional association for more than 7,500 qualified Chartered Legal Executive lawyers and 12,500 paralegal and other legal practitioners in England and Wales.

IPS

ILEX Professional Standards Ltd (IPS) is the regulator of Chartered Legal Executives and other members of CILEx. IPS also regulates practitioners and legal practices authorised to provide reserved and regulated legal services.

IPS sets the standards of conduct and qualification for those it regulates and assesses compliance with these standards. IPS takes proportionate and risk based action in cases of non-compliance.

For further information about the Probate Practice Rights contact:

THE CHARTERED INSTITUTE OF LEGAL EXECUTIVES

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INVESTOR IN PEOPLE