

Chartered Paralegal Membership Application form Experience Route

Applicant's Name	
Place of employment	
Area of legal practice	
Date legal work commenced	
Preferred email address	
Preferred contact number	

Duty 1

Your Conduct

In this section you will provide evidence of maintaining high standards of professional and personal conduct, acting with honesty and integrity and in the best interest of the client.

You will show how you consistently uphold ethical and professional conduct and regulatory duties, with an awareness of managing risk, compliance or organisational requirements.

Question

Question 1.1

Describe your understanding of the **CILEx Regulation Code of Conduct 2019** and how it impacts your delivery of legal services.

With consideration to the requirements of the CILEX Code of Conduct, can you give an example of when you have demonstrated accountability or have taken responsibility for your performance and behaviour.

Answer

Question 1.2

Describe an ethical issue you have encountered while representing a client's interests and explain how you managed the issue to show your commitment to upholding professional conduct and ethical principles. Please ensure you **reference the appropriate code of conduct** within your answer.

Answer

Question 1.3

With a specific example, please describe your approach to managing risk, compliance or organisational requirements relating to a client or your organisation.

Your answer should include a **specific** example of a **compliance or organisational requirement**, detailing:

- how you identified the risk or potential risk
- how you managed the situation
- If you escalated the matter, please provide details of the circumstances for escalation, including identifying the relevant person to escalate issues to.

Answer

Duty 2

Performing Routine and Complex Tasks

In this section you will provide evidence of conducting accurate legal research and analysis using digital tools to support routine and more complex legal matters. You will give examples of providing clear legal advice, applying the law correctly to present options and recommendations, and how you have communicated effectively with clients and/or stakeholders to obtain instructions. You will demonstrate your analytical thinking and problem-solving skills to overcome challenges.

Question 2.1

Give an example of a client or stakeholder scenario where you conducted legal research and explain how you met the needs of your client and/or organisation.

You **must** include:

- how you identified the client's/stakeholder's needs
- how you undertook the research using a range of resources, and reliable primary and secondary sources to complete the research
- how you addressed risk or managed challenges
- how you collaborated or engaged others where appropriate
- analysis of your research
- the outcome of your research
- how you presented your findings to meet the needs of your organisation (refer to guidance).

Answer

Question 2.2

Provide an example of your independent problem-solving skills including:

- details of a legal problem or potential legal problem
- how you used your analytical skills to present a plausible solution or make recommendations.

Answer

Question 2.3

Give an example where you have understood your client's position and given clear advice **of a legal nature**. You must demonstrate that you have:

- understood your client's position
- given clear and appropriate advice
- identified the law/procedure underpinning your advice.

Answer

Duty 3

Working with legal documentation

In this section you will provide evidence of identifying, processing, and drafting legal documentation using appropriate digital tools. You will demonstrate your understanding of the purpose of the documents and any legal or regulatory requirements for completion of the documents. You will also describe how your ability to proofread and draft using clear and precise language ensures quality and accuracy.

Question 3.1

Provide **two examples** of using your drafting skills to independently produce legal documents.

Your answer **must** include:

- the purpose of the document being drafted
- how you drafted the document, considering content, format and structure
- how the language used was clear, accurate and suitable for the purpose or recipient
- how you used digital tools/resources to ensure accuracy
- adherence to **legal, procedural, regulatory or organisational requirements**.

Answer

Question 3.2

Describe a situation where you had to meet a tight deadline for drafting legal documentation, explaining how you approached the task efficiently, without compromising on quality, to deliver the document on time.

Answer

Question 3.3

Provide an example of when you have critically reviewed your drafting to improve the quality of your document, considering accuracy, appropriate attention to detail and careful proofreading.

Answer

Duty 4

Working in a client's best interests

In this section you will provide evidence of your knowledge and applying the law correctly. You will demonstrate how you have been able to act in the best interests of the client, such as acting for a vulnerable client, and how you recognise individual risks and needs.

Question 4.1

Give an example of a complex legal issue where you **applied the law** correctly and determined the appropriate course of action.

You should:

- explain your approach to dealing with the legal issue
- identify and explain the relevant law
- explain how you applied the law to the matter
- explain how you communicated your application of the law.

Answer

Question 4.2

Provide an example of where you assisted in a matter, actively working in the best interests of your client, describing:

- the specific advice you gave
- the rationale behind your decisions
- how you ensured the advice met the client's needs
- how your approach demonstrated a commitment to advising in the client's best interests.

Answer

Duty 5

Working with stakeholders and other professionals

In this section you will provide evidence of engaging, building and maintaining effective working relationships with a team, clients or stakeholders to move forward transactions or legal matters and resolve issues. You will show how you recognise the principles of diversity and inclusion and the importance of this to the client and organisation.

Question 5.1

Give an example of how you have worked to recognise the interests of the stakeholder(s) in a legal issue you have been involved in, and;

- recognised who the stakeholder(s) is
- identified and analysed the available options
- assessed the risks and benefits of different options
- concluded on a way forward.

Answer

Question 5.2

Explain your **approach** to building strong working relationships with stakeholders and other legal professionals.

You should describe:

- the methods you use to engage in positive collaboration and build trust
- how you facilitate productive interactions with stakeholders or team members, emphasising how your approach contributes to a successful outcome.

Provide an example of a positive working relationship and how it has helped you to achieve a team or client objective.

Answer

Question 5.3

Give an example of a time when you have considered equality and diversity to act in a fair and inclusive way.

Answer

Duty 6

Progressing cases

In this section you will provide evidence of taking responsibility for your own workload, managing competing priorities and progressing legal matters, using digital systems and management tools where appropriate, to ensure all actions are accurately recorded in line with organisational procedure.

Question 6.1

Describe how digital tools and software are used within your organisation to support your work and identify how this ensures the highest standards of client delivery.

Answer

Question 6.2

Provide an example of using effective administration and management to progress a legal matter.

Please detail:

- how the matter progressed due to your proactive matter management skills
- what issues may have arisen had you not managed the matter appropriately.

Answer

Question 6.3

Describe how you manage competing priorities and monitor progress to continue to meet service level expectations, including an example of when it has been necessary to prioritise and reprioritise.

Answer

Duty 7

Commercial Awareness

In this section you will provide evidence of maintaining a focus on the commercial strategy and economic drivers within the organisation. You will show how you have identified opportunities to maximise business, where relevant, and manage workloads to ensure commercial viability.

You must demonstrate your understanding of the need to balance a high standard of service delivery with your organisations aims and objectives. You may want to consider time, resources, public funds, budget, sustainability of business model or profitability.

Question 7.1

What is your understanding of the commercial or economic aims and objectives of your organisation and how do you play a role in meeting those objectives?

Answer

Question 7.2

How do you ensure you are achieving a balance between meeting your organisation's commercial objectives and providing a high standard of service?

Answer

Question 7.3

Give an example of when you have planned your work or recommended changes to maximise efficiency and considered proportionality.

Answer

Duty 8

Managing data, risks and limiting liability for negligence

In this section you will demonstrate your understanding of key legislation and regulation including the **General Data Protection Regulation (GDPR)** and the **Data Protection Act 2018**. You will show awareness of the risks of data breach, money laundering, fraud and cybersecurity, and how your organisation is protected from these. You will also show how you consider risk or potential risk of negligence and takes steps to protect your organisation from such risk.

Question 8.1

Explain your organisation's **legal and regulatory requirements** for the use of data. What are the risks associated with your organisation's use of data and the organisational policies and procedures in place to mitigate the risk?

Answer
Question 8.2 What are the risks associated with money laundering, cybersecurity or fraud in your organisation and what measures are in place in your organisation to protect against these risks?
Answer
Question 8.3 Give an example of a time you have considered a risk or potential risk of negligence in your organisation and the steps you took to protect your organisation from the risk. • What was the risk/potential risk to your organisation? • What steps did you take to protect against or mitigate the risk? • How did/would the risk affect your organisation?
Answer

Duty 9
Knowing your limit
In this section you will provide evidence of giving appropriate advice and supporting team members in their development, with the ability to identify the limits of your professional experience and competence and escalating instructions that are beyond your scope of expertise. You will show how you recognise the requirement to maintain knowledge and competence.

Question 9.1

Give an example of a scenario where you escalated a legal matter to a senior colleague.

Your answer should detail:

- why you escalated the matter
- how you recognised it was beyond your remit.

Answer

Question 9.2

Describe an instance when you proactively sought feedback and explain how the feedback given allowed you to reflect and improve your working practices.

Answer

Question 9.3

Provide an overview of relevant training and development you have completed in the last year and explain how it improved your approach to work.

Answer

Question 9.4

Provide an example of how you have supported other legal professionals in their professional development, training, or career progression within your organisation or legal network.

Answer

Duty 10

Embracing developments

In this section you will provide evidence of embracing and adopting new developments in working practices and technology. You will demonstrate an awareness of the need to continually develop, grow and improve, sharing ideas for best practice and process improvement.

Question 10.1

Explain your awareness of emerging technology in the legal sector and how this may impact on the delivery of legal services.

Answer

Question 10.2

Describe how you have adapted to change in your organisation; how this has enabled you to develop and how it has improved your organisation?

Answer

Question 10.3

Provide an example where you have identified an opportunity to improve a process, a procedure or the service provided to clients,

You must include:

- how you identified the opportunity
- why you think it would bring an improvement
- what steps you took to develop the opportunity.

Answer

Authentication

Length of service with current employer	
Supervisor's name	
Supervisor's role	
Supervisor's legal qualification level (if held)	
Supervisor's professional membership level (if held)	
Supervisor's email address	
If you do not have a supervisor or line manager who is able to act as a referee for you, please state why.	

Notice to Applicants

The work you submit for assessment must be your own.

All examples given must have taken place within the last 10 years, and you must have at least 2 years' paralegal work experience within the last 5 years. We may, on occasion, request details of previous employment.

Your application will not be marked if there is evidence of plagiarism and malpractice procedures will be followed.

Declaration of Authentication

I have read and understood the Notice to Applicants above.

I can confirm that the work produced is authentic and my own.

Signed (Applicant)

Date

Notice to Supervisors

The application submitted to CILEX must contain examples which are written by the applicant, and which reflect the work undertaken.

Declaration of Authentication

I have read and understood the Notice to Supervisors above.

I can confirm that the work produced by the applicant is authentic and true.

I further confirm the Applicant has been employed within the organisation for the duration stated above.

Signed (Supervisor)

Date