



## Module Definition Form (MDF)

<b>Module code: MOD003735</b>	<b>Version: 2 Date Amended: 22/Aug/2013</b>
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<b>1. Module Title</b>
Private Client

<b>2a. Module Leader</b>
Pauline Hall

<b>2b. School</b>
School of Economics, Finance and Law

<b>2c. Faculty</b>
Faculty of Business and Law

<b>3a. Level</b>
7

<b>3b. Module Type</b>
Standard (fine graded)

<b>4a. Credits</b>
15

<b>4b. Study Hours</b>
150

<b>5. Restrictions</b>			
Type	Module Code	Module Name	Condition
Pre-requisites:	None		
Co-requisites:	None		
Exclusions:	None		
<b>Courses to which this module is restricted:</b>	Legal Practice Course		

## LEARNING, TEACHING AND ASSESSMENT INFORMATION

<b>6a. Module Description</b>
<p>This vocational elective subject develops the knowledge and understanding of Private Client gained in Stage 1 of the LPC, by taking that knowledge and building on it in the specific context of Private Client issues - Introduction to the subject, Rules of Intestacy, Requirements of a valid Will Revocation, Alteration, Republication and Revival of Wills, Will Drafting, Inheritance Tax Trusts and Trusts Administration, Lasting Powers of Attorney, Family Provision/Inheritance Provision for Family and Dependants Act 1975, Oath: Post Death Arrangements Variations, Elderly clients - Financial needs and Statutory Benefits.</p> <p>MODULE LEARNING OUTCOMES 1. Apply the necessary considerations to be borne in mind when dealing with Private Client issues with “hands-on” practical experience of probate law and practice; 2. Identify Case study transactions to be undertaken and gain knowledge and understanding in drafting correspondence and explaining instructions such as execution of wills, and drafting codicils; 3. How to apply the sections of the I (PFD) Act 1975 for bringing an action in Court and the criteria for such and application and the orders available. 4. Describe the procedures involved in obtaining and drafting Lasting Powers of Attorney forms and the criteria to be met. Knowledge and understanding of drafting oaths for administrators and executors and deeds of variation; 5. Explain and apply the knowledge and understanding acquired to Trusts, Post death Arrangements and elderly client issues and procedures. The SRA’s Outcomes for vocational elective subjects are to: 1. Demonstrate their knowledge and understanding and employ the applicable skills in the elective’s area of law and practice 2. Use the legal knowledge, skills and procedures and behaviours appropriate to each client and each transaction or matter 3. Identify the overall nature of the transaction, then plan and progress that transaction or matter through a series of steps and decisions including, where appropriate, drafting documentation 4. Identify the client’s goals and alternative means of achieving those goals, and deal appropriately with client care 5. Investigate and identify the relevant facts, research and identify the relevant legal issues, and advise the client on the legal consequences 6. Recognise and act within the rules of professional conduct 7. Identify the client’s reasonable expectations as to quality and timeliness of service.</p>
<b>6b. Outline Content</b>
<p>Students will be required to carry out specific tasks in the Workshop sessions which develop their knowledge and understanding of Private Client, such as professional conduct issues, drafting Will and Trusts, Lasting Powers of Attorney and Deeds of Variation and Disclaimer. It will entail drafting documents (to include letters to clients highlighting issues and providing advice) for example in Family Provision/Inheritance Provision for Family and Dependants Act 1975 applications and applying to the court.</p> <p>Students will also expand their knowledge of alternative means of care provision to include equity retention, home reversion plans and retirement housing.</p> <p>Finally, students will gain a greater understanding of, and ability to act in, private client issues and acquire learning outcomes from professional conduct scenarios and interpersonal skills. Throughout the workshops, there will be several drafting tasks as set out above.</p> <p>This module develops employability by making a student who studies this module attractive to any legal employer with a Private Client department. The advanced skills tasks will build a student’s confidence and competence in seeking legal, and other, employment.</p>
<b>6c. Key Texts/Literature</b>
The reading list to support this module is available at: <a href="https://readinglists.aru.ac.uk/">https://readinglists.aru.ac.uk/</a>
<b>6d. Specialist Learning Resources</b>
none

7. Learning Outcomes (threshold standards)		
No.	Type	On successful completion of this module the student will be expected to be able to:
1	Knowledge and Understanding	Please see section 6a above
2	Knowledge and Understanding	Please see section 6a above
3	Knowledge and Understanding	Please see section 6a above
4	Knowledge and Understanding	Please see section 6a above

8a. Module Occurrence to which this MDF Refers				
Year	Occurrence	Period	Location	Mode of Delivery
2024/5	ZZF	Template For Face To Face Learning Delivery		Face to Face

8b. Learning Activities for the above Module Occurrence			
Learning Activities	Hours	Learning Outcomes	Details of Duration, frequency and other comments
Lectures	8	All	Lecture 1 hr x 8 weeks
Other teacher managed learning	21	All	Workshop 3 hrs x 7 weeks
Student managed learning	71	All	Weekly reading for lectures and preparation for workshops, post-workshop tasks and consolidation. Exam revision
TOTAL:	100		

9. Assessment for the above Module Occurrence					
Assessment No.	Assessment Method	Learning Outcomes	Weighting (%)	Fine Grade or Pass/Fail	Qualifying Mark (%)
010	Examination		100 (%)	Fine Grade	50 (%)

**In order to pass this module, students are required to achieve an overall mark of 40% (for modules at levels 3, 4, 5 and 6) or 50% (for modules at level 7\*).**

**In addition, students are required to:**

- (a) achieve the qualifying mark for each element of fine graded assessment as specified above**
- (b) pass any pass/fail elements**

**[\* the pass mark of 50% applies for all module occurrences from the academic year 2024/25 – see Section 3a of this MDF to check the level of the module and Section 8a of this MDF to check the academic year]**