

# CLT Paralegal Practice Qualification in Court of Protection Practice



Preferred training partner of



INSTITUTE OF  
PARALEGALS

Setting Standards. Promoting Professionalism.

Court of Protection work is on the increase and becoming more complex as more clients become mentally compromised. Many individuals who fail to make LPAs fall within this jurisdiction. This presents a practice development opportunity for private client lawyers who need to offer a service to clients in order to meet the demand for Court of Protection applications.

As well as marketing and practice opportunities, this course includes sample forms and a case law update, and will equip practitioners with the skills to tackle the range of applications with confidence.

Recent Court of Protection statistics show that a large proportion of applications submitted contained errors. This course therefore looks at basic applications as well as wider applications with the intention of reducing the occurrence of such errors in the future.

It will also cover:

- The courts' jurisdiction and functions of the Office of Public Guardian
- When to apply to the Court for a welfare/financial decision
- The application and procedure for the appointment of a Deputy
- The application and procedure for Single Orders
- Sale and purchase of Property
- Trustees' applications
- Gifts, settlements and statutory wills
- Making decisions as a Deputy
- Making the most of state support
- Getting paid

## KEY FEATURES

- Flexible delivery – we don't keep you away from your day to day work
- Ready-made solution with up to date reference materials both online and hard copy
- Effective assessment and performance measures
- Feedback on progress and performance of staff
- Training records dealt with externally
- Dedicated expert tutor support
- Practical focus – we train staff how to work more efficiently with real life examples
- Cost effective
- Long term training solution

## BENEFITS TO EMPLOYERS

- Reduce risk
- Links directly to the bottom line for firms and organisations
- Boost reputation in industry and with clients
- Increase staff productivity
- Fewer interruptions to senior staff
- Staff are more profitable, quickly
- Better client engagement levels
- Lower staff turnover, increased retention
- Blended learning means no interruption to business as usual
- Increased staff agility
- Fulfil SRA obligations to 'provide a proper standard of service to clients' (Rule 5 Mandatory Principles)

## HOW DOES IT WORK

- Accredited by Skills CFA
- Five core modules provided by online and hard copy textbooks
- Three practical assignments to be completed in your own time by email
- Each assignment marked with feedback by dedicated expert tutor who is available by phone or email throughout
- Average completion time of 2-3 months with 1-2 hours' study per week
- Certificate provided on completion
- Can be delivered in-house to larger groups on-site

I enjoyed the course as it gave me the opportunity to do more work on my own. It has made me more confident in my convictions and has given the solicitors at the firm more opportunities to give me fee-earning work!

Paul Altoft,  
Paralegal  
Land Law LLP

## Module 1 - Professional Conduct

By the end of this module you will be able to:

- identify who is your client
- understand points to consider for the client to have capacity to instruct
- consider your confidentiality and disclosure duties
- identify what action to take if a conflict of interests arises
- outline the differences between undue influence and undue pressure
- understand when the client can cancel a contract made at home and the formalities required.

## Module 2 - Capacity Legislation

By the end of this module you will be able to:

- describe the premise of decision making under the Mental Capacity Act 2005, including its Principles, best interests and the Code of Practice
- understand the functions of the Public Guardian
- identify the extent and limits of the jurisdiction of the Court of Protection in decision making
- demonstrate how to maximise the client's capacity potential
- understand and apply the framework for assessing mental capacity under the Mental Capacity Act 2005 distinguish the difference between an unwise decision and a person's capacity
- understand when a best interest decision should be made
- follow the correct process to make a best interest decision.

## Module 3 - Lasting powers of attorney

By the end of this module you will be able to:

- understand the legal framework of lasting powers of attorney, take instructions, advise, draft and act as the certificate provider
- know how to revoke a power
- know how to disclaim a power.

## Module 4 - Court of Protection Deputyship

By the end of this module you will:

- know when to apply for a financial deputy, who should apply and what to do to avoid conflict
- understand the duties and obligations of a deputy
- know how to make an application for a financial deputy to the Court
- know how to get paid for Court of Protection work

## Module 5 - How to obtain state support

By the end of this module you will be able to:

- Identify the main non means tested welfare benefits available to disabled people
- Understand whether a client is likely to be eligible for NHS continuing healthcare
- Know when a registered nursing care contribution is available
- Understand when a person is eligible for section 117 Mental Health Act 1983 aftercare services
- Identify services which are available free from the local authority
- Know how to access care and support services from social services on behalf of a client
- Know whether the client has been correctly charged for their care and support

## HOW TO GET STARTED

You can start today!

Our training is available all year round. We simply need confirmation of your full name, email and billing address via our online registration form.

Once we receive this, our team will be in touch to confirm receipt and your preferred payment method.

For employers, we simply email through an invoice and send materials once we receive payment – if it helps budget we can allow payment over instalments.

Individuals can pay in full or by monthly instalment. For payment plans, we ask for your first instalment on registration.

## COURSE FEE

- £995 + VAT
- £695 + VAT for CLT & IOP Members
- Includes materials, assessment and certification
- Flexible payment options available

### Our clients include:

**ABSs & law firms** including Ashfords, CMS Cameron McKenna LLP, DLA Piper, Gelbers LLP, Irwin Mitchell, Shoosmiths, Thursfields and Trethowans

**Commercial organisations** including BAE Systems, BMW, BUPA, EE, GlaxoSmithKline, Nokia, Orange, Stagecoach Supertram, Tesco, Vodafone and Yeo Valley Farms (Production) Ltd

**Financial institutions** including American Express, Barclays, HSBC, Lloyds, National Australia Bank, NHBC and RBS

**Not for profit organisations** including the BBC, Cancer Research UK, Dogs Trust, NHS Property Services, Sanctuary Housing Association and the General Dental Council

**Governmental departments** including the Department of Work and Pensions, the Ministry of Justice and the Department of Transport Local authorities including Birmingham City Council, Mid Devon District Council, Nottinghamshire County Council and Sheffield City Council

**International organisations** including the Dubai Financial Services Authority, ICE Futures Europe, Nuance Communications Ireland, PDD Global and Tom Tom International

## WHO STUDIES THE COURSE?

The course is for anyone who could benefit from a better understanding of Court of Protection rules and practice, including:

- Support teams in Court of Protection departments in law firms
- Banks and building society staff
- Mental health workers
- Legal officers and other staff in local authorities
- Independent financial advisers
- Individuals looking to develop a better understanding of the rules

### What our clients say...

The programme enhanced the knowledge that I have gathered whilst working as a legal secretary. The most valuable aspect was gaining a qualification. The programme has given me confidence to continue with my career.

Margaret Elcome,  
Paralegal,  
Walter Gray & Co

I found the course practical and useful; qualifying helped make sense of my day to day workload. The manual has a very practical basis and is clear and concise to follow - it is an excellent resource which I still refer to regularly.

Lisa Badger,  
Paralegal,  
Eric Robinson Solicitors