

IMPORTANT ADDENDUM

Level 6 Unit 21 Probate Practice
January 2023

CASE STUDY MATERIALS

IMPORTANT NOTICE FOR CENTRE TUTORS and STUDENTS:

A **Version 2** of the Case Study Materials is being issued to centres and students to correct errors in the initial version. Please therefore only refer to **Version 2** of the Case Study Materials for the January 2023 examination.

This addendum explains the amendments which have been made to the Case Study Materials.

Error 1

Document 1, Page 3, Paragraph 6 of the Case Study Materials has an incorrect name of Stanley. The text in bold shows what has changed. It should read as follows:

Regarding **Sidney's** pension, in addition to the state pension, he has a works pension from which he is receiving £1,000 per month.

Minor changes

Document 3, Page 5, Points 3, 4 and 5 of the Will refer to 'my brother'.

These points should refer to 'my **said** brother'.

Error 2

Document 3, Page 5, Point 6 of the Will - The text in bold shows what has changed and should now read as follows:

6. Substitutional gifts of residue

If **my said** brother dies before me, I give all my estate **subject to the gift in clause 4** above to **my said** brother's children and if more than one in equal shares.

Minor changes

Document 3, Page 5 of the Will - the attestation clause should now read as follows:

Attestation

Signed this day of 2022

By the Testator in our
joint presence and then by us in his presence

Error 3

Document 4, Page 6, Paragraph 5 - The text in bold shows what has changed and should now read as follows:

Gareth was the only surviving relative. He went on to tell me that three years ago on 1st December 2019, his brother was trying to save tax and gave him £3000, and **one year ago** on 1st December 2021 he gave him £50,000 in shares.

Error 4

Document 5, Page 7, Section 2.1 of the Will - The text in bold shows what has changed and should now read as follows:

2.1 I appoint **the partners in the firm of Kempstons solicitors** to be the executors and trustees of my will

Document 5, Page 7, Section 4 of the Will - should now read as follows:

4. Gift of Residue

Subject to the above gifts and to payment of my debts, funeral, and testamentary expenses I give all my estate to **my civil partner Alice O'Donnell** on trust for her during her life and on her death as to the capital and income to such of my brothers and sisters as shall survive me and if more than one in equal shares.

Document 5, Page 7, Section 6.1 Advancement of Capital - should now read as follows:

6.1 Advancement of Capital

To pay or apply capital in accordance with section 32 Trustee Act 1932

Minor change

Document 5, Page 8 of the Will - the attestation clause should now read as follows:

Attestation

Signed this day of 2022

By the Testatrix in our
joint presence and then by us in her presence

Please note that case study materials attached to the examination which takes place on **Tuesday 24 January (afternoon)** will be amended to contain the correct information.