



ACCA

Important Information

Think Ahead

In July 2020, we wrote to our probate practitioners about a possible partnership with CILEx and CILEx Regulation (CRL) which would provide a pathway for eligible ACCA practitioners to achieve legal services authorisation and access to a range of support services. Partnering with another legal services regulator provides a pragmatic and cost-effective way to support our probate practitioners to diversify their service offerings.

Over the last year ACCA has worked closely with CILEx, CRL and our stakeholders to refine and finalise the CRL pathway and provide a route for the regulation of ACCA probate practitioners. We believe that the pathway we have developed with CRL will enhance the member value proposition for interested members, without increasing the risk exposure of ACCA.

The CRL pathway provides a proportionate, safe and cost-effective replacement for the regulation of existing and potential ACCA probate practitioners to enable them to continue to offer probate activities and participate in the legal services market. It also offers eligible practitioners the opportunity to achieve reserved legal activities authorisation beyond non-contentious probate work and, in turn, supports practitioners to diversify their service offerings.

In addition, the partnership with CILEx and CRL provides ACCA practitioners with access to a range of support services, including CPD. As an exclusive benefit, ACCA has commissioned education support on **Wills** for our probate practitioners. Please view this short [video](#) which provides an overview of the opportunity available to you. ACCA probate practitioners can register on the CILEx portal [here](#). After registration, we would ask you to provide the following details to this email address advisory@accaglobal.com:

- First name
- Surname
- Email
- Contact Reference No.

These details can be found on the portal on the 'My Details' page after registration [here](#).

As you may be aware, the Legal Services Board (LSB) is currently considering CRL's application in respect of its proposal to provide a route for the regulation of ACCA-Probate Practitioners and ACCA-Probate firms. The deadline for the LSB to make a decision is 20 October 2021. Although the application is subject to the LSB's approval, we consider it to be prudent to plan on the basis that the LSB will approve this.

ACCA intends to withdraw from legal services regulation on 31 December 2021. As a result, your ACCA authorisation for non-contentious probate work will cease on this date. In advance of our withdrawal from probate you will be required to choose **one** of the following three **Options**:

- (1) Authorisation by CRL as a CILEX-ACCA Probate Entity or a CILEx Authorised Entity
- (2) Authorisation by another approved regulator
- (3) Cease carrying out probate activities.

The CRL pathway enables ACCA probate practitioners to continue to offer probate as an ancillary activity to their accountancy work under a similar regulatory framework to that currently offered by ACCA. However, you will have the opportunity to make your own decision as to your future regulator if you wish to continue to offer probate services. Even if the LSB does approve CRL's application, the creation of this route does not preclude ACCA members from applying for probate regulation from other legal service regulators. In summary, there is **no** requirement for you to choose CRL but you will need to ensure that you are appropriately authorised to undertake probate activities.

We are committed to ensuring that all affected authorised persons are provided with guidance and support to make timely and informed decisions on the options available to them. We are currently finalising the transfer arrangements with CRL and we anticipate that affected authorised persons will be invited to submit an application via a dedicated CRL online portal by 30 November 2021. Further information to guide and support you through this process will be provided once the LSB has approved CRL's application, which is anticipated to occur late October.

Finally, the development of the CRL pathway and our decision to fully withdraw from probate regulation at the end of the year have inevitably put ACCA on a course to cancel its designation as an approved regulator for the reserved legal activity of probate (non-contentious). As a result, we will shortly be applying to the LSB to commence the de-designation process.

We will keep you informed of further developments and provide more detailed information on the three options, including the transfer arrangements to CRL, in the coming weeks.

In the meantime, if you should have any questions, please do not hesitate to contact [Glenn Collins](#) (Head of Policy, Technical and Strategic Engagement, ACCA UK) or [Laura Murphy](#) (Standards Manager).