



SQE2 · ORAL · INTERVIEW · 2026 - 2027

The SQE2 Client

Interview

and attendance note

Prepare, listen, advise and write it up, with two worked examples.

Twenty-five minutes, done well

FQPS Academy – SQE Prep

UPDATED OCTOBER 2026

fqps.co.uk

The Ultimate SQE Success Guide.*

This guide is part of a series.

You can find more here: [Downloads & Tools](#)

THE SERIES

SQE 2027 Changes · Ethics · Resitting SQE1 · Employer Funding

Income Tax · Solicitors Accounts · SQE1 Specification Checklist

SQE1 and SQE2 Readiness Checklists · SQE2 Client Interview

FQPS Academy is an independent SQE preparation provider, not affiliated with or endorsed by the Solicitors Regulation Authority or Kaplan. The SQE and SOLICITORS QUALIFYING EXAMINATION trade marks are the property of and are used under licence from the Solicitors Regulation Authority. General information for SQE candidates, checked on 7 October 2026: not legal advice.

Table of Contents

How the Station Works	03
The station on one page	04
What the Markers Look For	05
Grades and the note criteria	06
The Ten Minutes Before	07
Your preparation sheet	08
Running the Interview	09
Questions that work	10
Difficult moments	11
Ethics in the room	12
Writing the Attendance Note	13
The attendance note template	14
Worked Examples	15
The Wills note	16
A Property interview	17
Exam Traps & Practice	18
Test yourself	19
Tips	20
Your interview checklist	21





One hour, two markers.
Listen first, then
write it down well.

What is This Guide?

A practical route through the **SQE2 client interview and attendance note**: how the station runs, the eleven criteria and how they are graded, a **ten-minute preparation sheet**, a **six-stage interview** with a question bank, the ethics that hide in the room, an **attendance note template**, and two worked examples, one from **Wills** and one from **Property**, the two practice areas the SRA uses for this station.

Who This Guide is For?

- SQE2 candidates sitting from October 2026 to July 2027
- Anyone who freezes, rambles or runs out of time in a role play
- Candidates who know the law but lose marks on the note
- Paralegals and trainees who interview clients and want a method

Why It Matters?

You sit this station **twice**, and it is the only one where an actor marks you on how you treat a person. It is also a station where a calm routine pays: the SRA's specification fixes the timings (10, 25 and 25 minutes), so you can rehearse the routine until it is automatic, and keep your attention for the client and the law.

How the Station Works



The interview and attendance note is one of SQE2's six legal skills assessments, and you sit it **twice**: on oral day 1 in **Property Practice**, and on oral day 2 in **Wills and the Administration of Estates**. Each day also has one advocacy, and you may do either first. The SRA treats the interview and its note as a single assessment, so they are 2 of your 16.

Three stages, one hour

Stage	Time	What happens	Who marks it
Prepare	10 min	You read an email from a partner or a secretary saying who the client is and what they want to discuss, sometimes with documents	Not marked, but your notes are read with the attendance note
Interview	25 min	You interview the client, who is in the room. The client may be in vulnerable circumstances	The assessor playing the client, a trained actor, on skills only
Attendance note	25 min	In a separate room, you write the attendance note and legal analysis by hand	A solicitor, on skills and law

Two booklets, both marked

One for notes during preparation and the interview, one for the attendance note. The marker reads both, even if you never cross-refer. Cross out anything you want ignored: crossed-out text is not marked.

Advice: enough, not everything

The SRA says you need not give detailed advice in the interview. You do need enough preliminary advice, and to address enough of the client's concerns, to earn their trust and confidence.

Negotiation can appear

There is no negotiation station, but every SQE2 sitting has at least one assessment involving negotiation, and it can be this one.

What you are given

A calculator, a black ballpoint pen, writing paper and a highlighter. Your preparation papers go into the room with you. Clocks are provided; no watches.

Important: ethics is never flagged

The SRA says ethics and professional conduct issues "will not be flagged". You must spot them yourself, in the email, the documents or what the client says, and deal with them in the note.

Sources: SRA SQE2 specification and Assessments in SQE2 (from 1 September 2026); SQE2 FAQs; SQE2 assessment day page. Accessed 7 October 2026.



The Station on One Page

Eleven criteria, two markers, one hour

CRITERIA PARAPHRASED FROM THE SRA · TICK WHEN YOU MEET IT IN A TIMED PRACTICE

10 min
prepare

25 min
interview the client

25 min
handwrite the attendance note

CRITERION, IN OUR WORDS

MARKED BY

DONE

The interview: skills only

1. Listen and question

Let the client tell you what matters to them; use questions well

Actor

2. Explain clearly

Communicate in a way this client can understand

Actor

3. Be professional

Courteous, respectful and polite, respecting diversity where relevant

Actor

4. Be client-focused

See the problem from the client's point of view and what they want to achieve

Actor

5. Build trust

Establish and keep an effective relationship, so the client has confidence in you

Actor

The attendance note: skills

6. Record the relevant information

From the documents and from the interview

Solicitor

7. Identify next steps

For you and, where relevant, the client

Solicitor

8. Give client-focused advice

Advice that fits what the client wants, not just the law

Solicitor

The attendance note: application of law

9. Legally correct

Apply the law correctly to the client's situation

Solicitor

10. Legally comprehensive

Apply the law comprehensively to the client's situation

Solicitor

11. Ethics and conduct

Spot the issue and resolve it honestly and with integrity

Solicitor

From Assessments in SQE2, section 1 (applicable from 1 September 2026). From that date ethics is a separate, third "Law" category; the SRA says the format of the assessments does not change. Checked 7 October 2026.

What the Markers Look For



The SRA publishes **performance indicators** for each criterion: examples of behaviour that meets the standard of a newly qualified solicitor, and behaviour that falls short. Read the SRA's samples with them. Here they are, condensed.

Interview criterion	Shows competence	Falls short
Listen and question	Listens attentively, without judgement or assumptions; avoids interrupting; asks relevant questions; mixes open questions ("Can you tell me about...") with closed ones ("Do you own your own property")	Seems disinterested or distracted; tied to their own agenda or over-reliant on notes; repeats what the client already said; interrupts; asks only closed questions
Explain clearly	Plain language; explains any technical term clearly and briefly. The SRA's examples: "restrictive covenant", "legal easement", "age contingency", "nil rate band"	Verbose, legalistic, rambling or confused; uses jargon with little or vague explanation, even when the client asks
Be professional	Courteous and polite; builds rapport; gives difficult or unwelcome news clearly and with sensitivity; keeps a professional distance while showing interest; stays in control: organised, calm, not rushed	Consistently insensitive; overly familiar, flippant or joking; rude, dismissive, judgemental or patronising; hesitant throughout, rushed or flustered
Be client-focused	Understands the problem from the client's side, including commercial or personal circumstances; responds to concerns with interest and empathy	Advice that ignores the client's aims or concerns; no empathy
Build trust	Manages expectations: balances what the client wants against what can be done in the time; the client feels the matter is in good hands	The client would have little confidence the matter will progress, and would not want to instruct you

The actor is not a lawyer

The SRA says actor assessors are not legally qualified and do not assess the accuracy of your legal advice in the interview. Wrong law costs you in the note, where a solicitor marks it, and your interview notes are read too.

Nerves are not fatal

In the SRA's Property sample, the candidate is "very nervous and hesitant at the beginning", improves, and still clearly passes. Recovering control matters more than a perfect start.

Sources: SRA Performance indicators for the SQE2 interview assessment; SQE2 FAQs; SQE2 sample question, Property Practice (December 2025). Quoted words are the SRA's. Accessed 7 October 2026.

How each criterion is graded

Every criterion gets a grade from A to F, a global professional judgement against the standard of a newly qualified solicitor. The grades become marks, with **A worth 5 and F worth 0**.

Grade	SRA label	Meaning
A	Superior performance	Well above the competency requirements
B	Clearly satisfactory	Clearly meets them
C	Marginal pass	On balance, just meets them
D	Marginal fail	On balance, just fails to meet them
E	Clearly unsatisfactory	Clearly does not meet them
F	Poor performance	Well below them

Across SQE2, skills and application of law are **weighted equally**, and there is **one pass mark for SQE2 as a whole**: no separate pass mark for the oral or the written assessments.

What the note marker looks for

Note criterion	Shows competence	Falls short
Record all relevant information	Sets out the relevant facts from the documents and the interview: facts that matter to the client's objectives or to the legal analysis	Misses relevant facts, or includes "many facts" with no bearing on the advice
Identify next steps	Steps that move the matter on, such as a letter of advice to the client or a request for more information	No next steps, or lines of enquiry with no bearing on the client's problem
Client-focused advice	Addresses the legal problem and the client's commercial or personal circumstances	A legal analysis that ignores the client's concerns
Law: correct and comprehensive	Identifies the fundamental principles and applies them correctly, in enough detail for the facts	Wrong or missing principles, or not enough detail
Law: ethics	Recognises the ethical issue and exercises effective judgement under the SRA Principles and Codes	Misses it, or handles it badly

Names of cases and sections: you need them only where the name is the usual label for a principle. The SRA's interview samples say "exact citations" are not required. Get the principle right; the section number is a bonus.

Sources: SRA SQE2 assessment specification, Marking SQE2; Performance indicators for the attendance note/legal analysis; SQE2 sample questions (December 2025). Accessed 7 October 2026.



The Ten Minutes Before

Ten minutes is enough to read twice and plan once. Our routine, not an SRA rule, splits it into four blocks. Plan the **questions** and the **legal frameworks**, not a script of advice: you cannot know the facts yet.

2'

Read the email

Who is the client? What does the partner want? Highlight any **specific questions**: the note must answer them.

1'

Read the note to candidates

It tells you what **not** to cover, such as client care, costs, identity or money laundering. Strike those out of your plan.

4'

Read the documents

A will, a lease extract, a title. Mark dates, names, gifts, obligations. Ask: what is missing that only the client can tell me?

3'

Plan the interview

Fill the preparation sheet (page 08): issues, facts to find, ethics radar, your opening words.

Run it on the SRA's Wills sample: the partner asks for advice on the client's questions about distributing her brother's estate and inheritance tax, and whether she can act as sole executor. The partner has confirmed the will is valid. The note to candidates rules out client care (including costs) and money laundering.

1

Headings for the note: executors; the gifts in the will; distribution; inheritance tax.

2

Struck out: validity of the will, costs, client care, money laundering.

3

Facts to find: date of death, family, what happened to each gift, assets, debts, lifetime gifts.

Your Preparation Sheet

Our method. Copy this layout onto the first page of your notes booklet in the first minute, then fill it as you read. It doubles as your interview agenda.

CLIENT AND MATTER

Name, who they are (individual, executor, company director), what they have come about, who sent the email.

THE PARTNER'S QUESTIONS

Every specific question or issue in the email. Each one becomes a heading in your note.

DO NOT COVER

From the note to candidates: client care, costs, identity, money laundering, validity already confirmed...

ETHICS RADAR

Third party giving instructions? Vulnerability? Conflict between two clients? A gift to the firm? Unexplained money?

ISSUES AND THE LAW I WILL NEED

One line per issue: the issue, then the framework. Example: "Gift of a car that was sold: specific gift fails?" Leave space under each.

FACTS TO FIND

Who: family, co-owners, other parties. What: assets, debts, documents. When: dates and deadlines. How much: values. Why: what the client wants to achieve.

QUESTIONS TO OPEN EACH TOPIC

Open first: "Can you tell me about...". Then probe and close: "When exactly?" "Is that in your sole name?"

MY OPENING WORDS

Name, role, the time we have, what we will cover, and that I will confirm advice in writing.

NEXT STEPS I CAN ALREADY SEE

Documents to request, checks to make, a letter of advice, a further meeting.

The SRA lets you take your preparation papers into the interview room, and the marker reads your notes booklet with your attendance note.

Running the Interview



A fixed structure keeps you in control, which the SRA's indicators reward, and frees your attention for the client. Ours has six stages with a time budget for 25 minutes. The clock in the room is your friend: glance at it at each stage change.

Stage	Budget	What you do
1. Welcome and agenda	2 min	Introduce yourself and your role. Say how long you have, what you will cover, and that you will confirm advice in writing. No need to shake hands
2. The client's story	4 min	One open question ("Can you tell me what has happened?"), then listen without interrupting. Note the client's own words for their goals and worries
3. Explore each issue	9 min	Topic by topic from your sheet: open, then probe, then closed questions to pin down facts, dates and figures. Signpost each move: "Next I'd like to ask about the house"
4. Summarise and check	2 min	"Let me check I have this right..." Recap facts and goals; invite corrections. It shows listening and catches gaps
5. Preliminary advice	6 min	Enough to answer the client's main worries, in plain words, with options. Give unwelcome news clearly and kindly. Say what you need to check
6. Close	2 min	Next steps for you and for the client, with timing; what they should bring or send; any questions? Thank them

An opening that works (our wording): "Good morning, I'm Sam Lee, a solicitor working with [partner]. We have about twenty-five minutes. I'd like to hear what has happened and what you would like to achieve, ask some questions, and then give you some initial thoughts. I'll confirm everything in writing. Is that all right?"

1

It sets the agenda and the time, so the client knows where you are going.

2

It promises written advice, so you need not solve everything in the room.

3

It ends with a question: the client agrees the plan, and the relationship starts.

Running late? At 18 minutes, move to the summary whatever is left. A client who leaves with a clear summary and next steps feels in good hands; one who is cut off mid-question does not.

Questions that work

The SRA's indicators ask for a combination of open and closed questions. Use the funnel: open to let the client talk, probing to go deeper, closed to fix a fact. Examples are ours.

Type	Use it to	Example
Open	Start a topic; hear priorities	"Can you tell me about your family?" "What would you like to happen to the house?"
Probing	Go deeper on what the client said	"You said Daniel suggested it. How did that conversation come about?"
Closed	Fix a fact, a date or a figure	"Is the house in your sole name?" "When did your brother die?"
Clarifying	Avoid an assumption	"When you say partner, do you mean in business, or your personal partner?"
Summarising	Check and show you listened	"So, you want Leah's extra money protected, and the house to go to the survivor. Is that right?"
Goal	Find what matters most	"If we can only achieve one thing, what matters most to you?"

Avoid

Leading questions that put words in the client's mouth ("You're happy with that, aren't you?"), several questions at once, and re-asking what the client has already told you: the SRA lists repeating information as falling short.

Silence is a tool

After an open question, wait. Clients often add the important detail after a pause. Writing a note while they talk shows you are listening; reading your notes while they talk does not.

Jargon into plain English

The SRA's indicators name these four terms as ones to explain. Our plain-English versions:

Restrictive covenant	A promise in the title deeds not to do something on the land, such as building more houses, which can bind later owners.
Legal easement	A right over someone else's land, such as a right of way across a neighbour's drive.
Age contingency	A gift that only takes effect if the person reaches a stated age, for example 25.
Nil rate band	The part of an estate charged to inheritance tax at 0%. The figure is given in the exam when you need it.

Phrases that keep you in control

Signpost

"I'd like to move on to the deposit now, if that's all right."

Check understanding

"I've used a few legal terms there. Would it help if I explained any of them?"

Manage expectations

"I can't promise that today, but I'll check the lease and write to you by Friday."

Difficult Moments

Whose instructions are these? Run the tree whenever someone other than the client shapes what the client wants. Our method, based on SRA Code of Conduct 3.1 and 3.4 and SRA guidance on vulnerable clients and third parties.

1

Is someone else telling you what the client wants, or answering for the client?

A relative, a friend, a carer, a co-buyer, a business partner.

YES

Take instructions from the client

Verify them with the client directly; seeing the client alone is good practice. Get the client's signed authority before dealing with the third party.

↓

NO

2

Do the instructions seem to come from someone else's wishes?

"He says I should...", a sudden change from an earlier will, a gift to the person who arranged the meeting.

YES

Do not act yet

Explore with open questions. Act only once satisfied the instructions are the client's own (3.1). Record why.

↓

NO

3

Is there a reasonable doubt about the client's capacity?

Confusion about family or assets, not just a forgotten date.

YES

Take steps and record them

For a will, consider a doctor's opinion where appropriate. Adjust how you explain (3.4).

↓

NO

Take instructions and advise in the usual way

Still record in the note what you saw and asked: it shows the marker the ethical judgement behind your advice.

Other moments, and our response

Moment	Response
The client is upset or grieving	Pause, acknowledge it in plain words, offer a moment. Then return gently to the agenda
You do not know the answer	Say so honestly: you will check and confirm in writing. Never guess at law to fill a silence
The news is bad	Say it clearly, early, with the reason and what can still be done
The client keeps going off topic	Acknowledge, then signpost back: "That's helpful. Can we come back to the lease?"
The client asks you to do something improper	Explain calmly what you cannot do and why, and what you can do instead. Record it

Ethics in the room

The SRA can build an ethics point into either practice area, and its specification says situations can come from SRA warning notices. These are the ones an interview tends to surface (Code: SRA Code of Conduct for Solicitors).

What you hear	The rule	What you do, and record in the note
"My nephew says I should..." or a relative gives the instructions	You act only on the client's instructions, or someone properly authorised (Code 3.1)	Take instructions from the client and verify them directly; seeing the client alone is good practice. If you suspect they are not the client's wishes, do not act until satisfied they are. Get signed authority before dealing with a third party (SRA guidance)
The client seems confused, unwell or under pressure	Take account of the client's attributes, needs and circumstances (3.4)	Adjust how you explain. With reasonable doubt about capacity, take steps to determine it and keep a record; for a will, consider a doctor's opinion where appropriate (SRA guidance)
"I want to leave something to you" (or your family or staff)	Own interest conflict; SRA wills guidance	A significant gift: the client should first take independent legal advice; if they will not, you will usually need to stop acting
"Do I have to use you as my executor?"	SRA wills guidance	No. Explain the options: a family member or beneficiary can act, and can instruct a solicitor later. Record the advice and the choice
Two clients, one matter: co-buyers, or executors who disagree	Conflict of interest (6.2)	Identify where their interests differ. Act for both only if an exception applies, all give informed consent in writing and it is reasonable to act; get each client's own instructions
A relative or friend asks what the client told you	Confidentiality (6.3)	Say nothing without the client's consent, unless the law requires or permits disclosure
Money from an unexpected or unexplained source	Customer due diligence; ongoing monitoring, including source of funds (MLR 2017 reg. 28)	Ask where the money comes from and ask for evidence. If you become suspicious, report internally and say nothing that could tip the client off (POCA 2002 s.333A)

Read the note to candidates first

The SRA's samples tell candidates what they need not cover. The Wills sample: no client care (including costs) or money laundering. The Property sample: no client care, money laundering or client identity, "as the partner has already dealt with these", but "You should consider professional conduct issues, as appropriate." Do what the papers ask, and nothing they rule out.

How it reads in the note (our wording): "Professional conduct. Client's nephew arranged the meeting and proposed the gift to himself. Instructions must be the client's own (Code 3.1). I saw the client alone; her own wishes differ. Next: second meeting with the client alone before drafting."

1

Name the issue in the client's facts.

2

State the rule in a few words.

3

Say what you did in the meeting.

4

Say what happens next.

Sources: SRA Code of Conduct (from 11 April 2025); SRA guidance on vulnerable clients (2022) and on wills; MLR 2017 reg. 28; POCA 2002 s.333A; SRA samples (December 2025). Accessed 7 October 2026.

Writing the Attendance Note



The SRA lists what the attendance note and legal analysis should do. Treat the list as your checklist: each item is a heading in the template on the next page.

1

Record

All the relevant information from the interview and the documents.

2

Analyse

The legal issues that arise in the matter.

3

Advise

Your initial advice to the client, and any specific questions in the email.

4

Next steps

For the solicitor and, where applicable, the client.

5

Ethics

Any ethical issues and how they should be dealt with.

6

Negotiation

Options and strategies, if the matter involves one. It may not.

Rules of the note

By hand, in 25 minutes

Handwritten, in a base room after the interview. Write for a busy partner: headings, short points, numbered issues.

Use your interview notes

They are marked too. You may cross-refer to them ("family tree: interview notes p.2") instead of copying, but need not.

Not a perfect model

The SRA calls its sample notes "not perfect nor a model answer". They pass on clear facts, correct core law and sensible next steps.

Weak line, strong line (our example)

Weak

"Discussed witnesses. Advised client." No law, no facts, no outcome: the marker cannot credit what is not written.

Strong

"Witnesses: two, present together (s.9). A gift to a witness or their spouse fails (s.15), so the nephew and his wife must not witness. Advised: sign here with two staff witnesses."

Sources: SRA Assessments in SQE2, section 1; SQE2 FAQs; SRA SQE2 assessment day page; SQE2 sample questions (December 2025). Accessed 7 October 2026.

The Attendance Note Template

Our method. Seven headings, in this order, every time. The right-hand column shows which criterion each heading feeds.

- | | | |
|----------|---|--|
| 0 | Heading block
Attendance note. Client; matter; date; who attended; length of meeting. Two lines, no more. | Housekeeping |
| <hr/> | | |
| 1 | Instructions and objectives
Why the client came, in two or three sentences, and what they want to achieve in their own words: "Wants to be fair to both children". | Client-focused advice |
| <hr/> | | |
| 2 | Key facts
Only facts that matter to the advice: people and relationships, assets and values, dates, documents. Use a mini family tree or a list. Cross-refer to your interview notes instead of copying. | Record all relevant information |
| <hr/> | | |
| 3 | Issues and advice
Number each issue, starting with the partner's questions. For each: issue , the law in a sentence, application to these facts, the advice given in the meeting, and anything to confirm in writing . Give options and say which you recommend. | Legally correct; legally comprehensive; client-focused |
| <hr/> | | |
| 4 | Professional conduct
Name the issue, the rule, what you did in the meeting and what happens next. If there is none, one line saying what you checked. | Ethics and professional conduct |
| <hr/> | | |
| 5 | Negotiation (if any)
The client's aims, their bottom line, the other side's likely position, and options to put forward. | Client-focused; law |
| <hr/> | | |
| 6 | Next steps
Two lists. Us : letter of advice, checks, drafting, further meeting, with timing. Client : documents to send, decisions to make, people to speak to. | Identify appropriate next steps |

Your 25 minutes

3 min plan: list the issues and order them. **18 min** write: facts, then each issue. **4 min** check: every partner question answered, next steps listed, ethics dealt with.

Handwriting that scores

Headings in capitals, short bullet points, abbreviations defined once ("Rosa Bennett (RB)"), figures in digits. Leave a line between issues so you can add a point later.

Short of time?

Never drop the partner's questions or the next steps. Cut the facts instead: cross-refer to your interview notes, which are marked too.

Worked Examples



Day 2 context. Invented client and facts. First the papers, then what a well-run interview drew out.

Email from the partner: "Rosa Bennett, 81, is a new client who wants to make a new will. Her nephew Daniel Hart booked the appointment and drove her in; he is waiting in reception. On the phone Rosa said she wants to leave her house to Daniel. Please take full instructions and write an attendance note with your advice, next steps and any conduct issues. Identity checks are done; you need not deal with client care or costs."

What the interview drew out

The candidate asked	Rosa said
"Can you tell me about your family?"	Widowed in 2019. Two children: Mark, 52, in Australia, and Anna, 48, who lives nearby and visits weekly. Daniel is her late sister's son
"Do you have a will at the moment?"	Yes, made "years ago", leaving everything to Mark and Anna equally. She is not sure where the original is
"What do you own?"	Her house, 3 Elm Close, in her sole name, no mortgage, worth about £400,000 she thinks; savings of about £60,000
"Tell me about Daniel."	He has lived with her for 18 months since her fall, and does her shopping and lifts. "Daniel says the house should be his because he looks after me, and the children won't mind."
"What would you like to happen, in your own words?"	After a pause: she wants "to be fair to everyone", and for Daniel "to have somewhere to live"
"Who would you like to witness the will?"	Daniel and his wife Priya, "to save trouble"
"Who would you like as executors?"	She asks: "Do I have to have your firm?"

What earned the skills marks

Open questions first, then closed ones to fix facts. The goal question found the gap between Daniel's plan and Rosa's own wish. The candidate gave the news about the witnesses kindly and explained "executor" in plain words.

What the papers flagged

A nephew who booked the meeting, waits outside and benefits from the change. That is the ethics point, and it was not labelled. The note on the next page deals with it first.

Worked example: the Wills note

A note that would score well, written to our template. It is a guide, not the only answer. Invented facts.

ATTENDANCE NOTE. Client: Rosa Bennett (RB). Matter: new will. Attended: RB alone (nephew Daniel Hart (DH) in reception). 25 minutes.

1. INSTRUCTIONS AND OBJECTIVES

RB, 81, wants a new will. DH has suggested she leave him her house. RB's own words: wants "to be fair to everyone" and for DH "to have somewhere to live".

2. KEY FACTS

Widow (2019). Children: Mark (52, Australia), Anna (48, local). DH: late sister's son, has lived with RB 18 months, helps daily. Existing will (date unknown): all to Mark and Anna equally; original not located. Assets: house, sole name, no mortgage, about £400,000 (RB's estimate); savings about £60,000. RB clear on family and assets; unsure of the date of her old will.

3. ISSUES AND ADVICE

(a) Whose wishes? The gift of the house came from DH. A will needs RB's own knowledge and approval and must be free of undue influence. I saw RB alone. Her own aims differ from DH's suggestion. *Advised:* we will take her instructions from her alone and she need not decide today.

(b) Options to meet her aims. (i) House to DH outright: Mark and Anna get only the savings. (ii) A right for DH to live in the house (for life or a set period), then the house to Mark and Anna. This needs a trust in the will: to explain in writing. (iii) A cash gift to DH and the rest to the children. RB liked (ii). *To confirm in writing.*

(c) Family claims. If the children receive less, either may apply to court as a child of the deceased for reasonable financial provision (1975 Act s.1), normally within six months of the grant (s.4). We will record her reasons in writing.

(d) Witnesses. A will needs two witnesses present at the same time (Wills Act 1837 s.9). A gift to a witness, or to a witness's spouse, is void, though the will stays valid (s.15). If DH or his wife Priya witnessed, any gift to DH would fail. *Advised:* sign at our office with two independent witnesses.

(e) Old will. The new will, with a revocation clause, revokes the old one once validly signed (s.20); until then the old will stands. Helpful to find the original.

(f) Executors. No need to appoint our firm: Anna or another trusted person can act and can instruct a solicitor later if needed.

4. PROFESSIONAL CONDUCT

Instructions must be RB's own (Code 3.1): saw her alone; second meeting alone before drafting. Risk of undue influence (SRA wills guidance): if Mark or Anna will receive less, record RB's reasons and that the implications were explained. Capacity: no real doubt seen, but given her age and the change of plan, suggest a doctor's opinion with RB's consent. Confidentiality (6.3): nothing to DH without RB's consent.

5. NEXT STEPS

Us: letter of advice on options (b) to (f) within 3 days; arrange second meeting with RB alone; doctor's opinion if RB agrees; draft will once instructions confirmed; signing at our office with two staff witnesses. **RB:** consider the options; look for the original old will; think about executors.

Why it scores: every fact recorded is used in the advice; the partner's request (full instructions, conduct issues) is answered; the law is applied to Rosa's facts, with options matched to her own words; the ethics point leads the conduct section; and both lists of next steps have owners and timing.

Worked example: a Property interview

Day 1 context. Invented clients and figures. The papers, then the note.

Email from the partner: "Tom Price and his partner Leah Ford are buying 7 Orchard Close, a registered freehold house, for £320,000 with a mortgage. Tom is coming in alone today. Please take instructions on how they want to own the house and on the deposit, and note any conduct issues. Client care is done."

ATTENDANCE NOTE. Client: Tom Price (TP), attending alone, and Leah Ford (LF). Matter: purchase of 7 Orchard Close.

1. INSTRUCTIONS AND OBJECTIVES

TP and LF, unmarried, together 4 years, want to buy. TP: "if one of us dies, the other should get the house". He says LF wants her extra money protected if they split up, and is "happy for me to decide everything".

2. KEY FACTS

Price £320,000. Deposit £60,000: TP £10,000 savings; LF £50,000 (£10,000 savings, £40,000 from her mother, Mrs Ford, from an account in Spain). Joint mortgage £260,000. No wills. Their tenancy ends 31 March.

3. ISSUES AND ADVICE

(a) Joint tenants or tenants in common? The legal title is always held jointly; the choice is about the beneficial interest. As joint tenants they own the whole together: on a death the survivor takes everything, and they are treated as equal. As tenants in common each owns a share, which passes under their will (or intestacy) and can be unequal. TP's two aims pull in different directions. *Advised:* tenants in common in unequal shares, recorded in a declaration of trust (it must be evidenced in signed writing: LPA 1925 s.53(1)(b)), plus wills leaving each share to the other. That meets both aims.

(b) Shares, one way. Deposit plus half the mortgage each: TP £10,000 + £130,000 = £140,000 (43.75%); LF £50,000 + £130,000 = £180,000 (56.25%). They may choose another split: it is their decision.

(c) Wills. An unmarried partner takes nothing under the intestacy rules (AEA 1925 s.46). Without wills, a share could pass to parents or siblings. A partner who lived with the deceased as a couple for the two years before the death can only seek provision through a court claim (1975 Act s.1(1A)).

(d) Later changes. A beneficial joint tenancy can be severed by written notice to the other joint tenant (LPA 1925 s.36(2)), though the legal title stays joint; a declaration of trust can set out what happens on a sale or separation.

4. PROFESSIONAL CONDUCT

We act for both buyers: LF must give her own instructions (Code 3.1); TP cannot decide for her. Their interests on the shares may conflict (6.2): we can act for both on this only if they have a substantially common interest, both give informed consent in writing and it is reasonable to act; otherwise LF (or TP) should take separate advice on the declaration of trust. Source of funds: evidence of where the £40,000 from abroad comes from (MLR 2017 reg. 28(11)); for the lender and the trust deed, written confirmation that it is a gift, not a loan. If anything is suspicious, report to our MLRO and say nothing to the clients that could tip them off.

5. NEXT STEPS

Us: letter to TP and LF; meeting or call with LF; draft declaration of trust; check the lender's requirements on the gifted deposit; offer wills. **Clients:** agree shares; Mrs Ford to provide bank statements and confirm the gift in writing.

Why it scores: it resolves the clash between Tom's two aims with a solution rather than a list of rules; it shows the arithmetic behind the shares; it spots both conduct points (instructions from one co-buyer only, and the source of the gifted money); and it gives each client a clear next step.

Exam Traps

Ten ways good candidates lose marks at this station.

1. Advising before listening

Jumping to the law in minute three. You miss facts and the client feels unheard.

3. Ignoring the partner's questions

Every specific question in the email must be answered in the note, under its own heading.

5. Missing the unflagged ethics point

A relative giving instructions, a gift, two clients with different aims. Nobody will label it.

7. A transcript, not a note

Writing everything said, in order. Record the relevant facts; leave out the rest.

9. No next steps

A whole criterion depends on them. Two lists, us and the client, with timing.

2. Interrogating

Only closed questions, read from your sheet. The SRA lists this as falling short.

4. Covering what the papers rule out

If the note to candidates says no client care or costs, time spent on them earns nothing.

6. Jargon

"Severance", "residue", "intestacy" without a plain explanation, even after the client looks lost.

8. Advice with no application

Stating the rule without saying what it means for this client, these facts, this goal.

10. Running out of time

No summary, no close. Move to the summary at 18 minutes, whatever is left.

Before you leave the room, ask four questions

1

Do I know what the client wants most?

2

Have I got every fact the partner's questions need?

3

Whose instructions are these?

4

Does the client know what happens next?

After every practice, grade yourself

Give each of the eleven criteria on page 04 a grade from A to F, as the SRA's assessors do. Fix the lowest grade first, then practise again. Two weak criteria fixed beat ten strong ones polished.

Test yourself

Cover the answers and say yours out loud. Names and facts are invented; the rules are sourced in this guide.

1 Who marks the interview, and on what?

Answer. The assessor playing the client, a trained actor, on skills only. The attendance note is marked by a solicitor on skills and law.

2 How long do you have to prepare, interview and write the note?

Answer. 10 minutes, 25 minutes and 25 minutes. The note is handwritten.

3 Your notes booklet has a wrong point you wrote mid-interview. What do you do?

Answer. Cross it out. The marker reads the notes booklet too, and crossed-out text is not marked.

4 Must you give full advice in the interview?

Answer. No. You need enough preliminary advice, and to address enough of the client's concerns, to win their trust and confidence. Detail can follow in writing.

5 A client wants her son and his wife to witness her will, which leaves the son a legacy. Advise.

Answer. The will can still be valid, but the son's legacy would be void (Wills Act 1837 s.15). Use independent witnesses: two, present at the same time (s.9).

6 A client's daughter answers every question for him and says "Dad wants me to have the business".

Answer. Take instructions from the client himself; seeing him alone is good practice. Act only once satisfied they are his own wishes (Code 3.1). Record what you did.

7 Two unmarried co-buyers: one wants survivorship, the other wants a bigger deposit protected.

Answer. Tenants in common in agreed shares, a declaration of trust evidenced in signed writing, and wills leaving each share to the other. Get both clients' instructions.

8 The note to candidates says you need not deal with client care. The client asks about your fees.

Answer. If it happens, answer briefly and politely (costs will be confirmed separately) and move on. The SRA's Wills sample says candidates will not be asked about client care there. Spend your time on what the papers ask for.

9 A grieving client starts to cry while describing her brother's death.

Answer. Pause, acknowledge it, offer a moment, then return gently to the agenda. Sensitivity is in the professional manner criterion.

10 Your note explains the law on each issue. What else does the marker need?

Answer. Application to these facts, client-focused advice and options, any ethics point and how you dealt with it, and next steps for you and the client.

Rehearse out loud

An interview is a spoken skill. Silent revision does not train it.

Run the six stages with a friend playing the client, against a 25-minute timer. Swap roles: playing the client shows you how jargon and interruptions feel.

Write the note by hand

Twenty-five minutes of handwriting is tiring if you never practise it.

After every practice interview, write the note on paper with a pen, to the template, against the clock. Then mark it against the six note criteria on page 06.

Learn the frameworks, not scripts

Each practice area has a handful of recurring frameworks.

Wills: validity and formalities, gifts that fail, intestacy, executors, family claims. Property: co-ownership, the transaction steps, lease terms, money laundering. Revise them as short lists you can apply in the room.

Use the SRA's samples properly

The SRA publishes a Wills and a Property sample, with a recorded interview and a sample note.

Do each one timed before you look at the answer, then read the SRA's analysis with the performance indicators beside it. Note what the sample candidates did that you did not.

Bonus Tip - Keep SQE1 law alive

The note is marked on legally correct and comprehensive advice.

SQE2 draws on the SQE1 law behind each practice area: Land Law for Property, Trusts for Wills. Our full-length SQE1 mocks in the 2027 format (2 x 85 questions) are SQE1 practice, not interview practice: use the routines in this guide for the interview itself.

Your Interview Checklist

Tick a line only when you can do it under time, without notes.

The station

- ☐ I know the timings, the two practice areas and who marks what (page 03)
- ☐ I can name all eleven criteria from memory (page 04)
- ☐ I know what competent and weak performance look like for each (pages 05 and 06)

Before the interview

- ☐ I can fill the preparation sheet in ten minutes (page 08)
- ☐ I always read the note to candidates and strike out what it rules out (page 07)

In the room

- ☐ I can run the six stages to time without looking at notes (page 09)
- ☐ I use open, probing and closed questions, and summarise before advising (page 10)
- ☐ I can explain the four SRA example terms in plain English (page 10)
- ☐ I can handle a third party, a vulnerable client and bad news (pages 11 and 12)

The attendance note

- ☐ I can write the seven headings from memory (page 14)
- ☐ I have written a full note by hand in 25 minutes, at least five times (page 14)
- ☐ I apply the law to the facts and give options, not just rules (pages 16 and 17)
- ☐ Every note has an ethics heading and two lists of next steps (page 14)

Practice

- ☐ I have done both SRA samples timed and read the SRA's analysis (page 20)
- ☐ I have scored ten out of ten on the self-test (page 19)

Make the interview a routine

STEP 1

Learn the criteria

The eleven on page 04, until you can say them in order.

STEP 3

Practise out loud

Ask someone to play the client, set a 25-minute timer and record yourself.

STEP 5

Keep the law sharp

For SQE1 law: full-length SQE1 mocks in the 2027 format (2 x 85 questions). For SQE2 options, see fqps.co.uk/pricing.

STEP 2

Build your routine

The preparation sheet, the six stages and the template, on pages 08, 09 and 14.

STEP 4

Write, then mark

Handwrite the note in 25 minutes and grade it A to F against page 06.

STEP 6

Questions?

Email support@fqps.co.uk and a person will answer.

FQPS Academy. Full-length SQE1 mocks in the 2027 format (2 x 85 questions).

Create your account

prep.fqps.co.uk

Sign up



Supporting - candidates

We are committed to the success and well-being of every student.



A question about SQE2, qualifying or which plan fits you? Write to us.

support@fqps.co.uk

Interviewing improves with repetition out loud. Run one timed interview a week with a friend as the client, then handwrite the note and mark it against the criteria.



Prepare for SQE1 and
SQE2 with our SQE
courses.



Practice questions, full-length
SQE1 mocks in the 2027 format (2
x 85 questions) and free guides like
this one, online, whether you're in
the UK or abroad.



Scan for every free
FQPS guide and tool



FQPS Academy
fqps.co.uk

Email: support@fqps.co.uk
Website: fqps.co.uk

 [Instagram.com/fqpsacademy](https://www.instagram.com/fqpsacademy)

 **FQPS Academy**