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**Job description**

**Job Title:** Chartered Legal Executive/Solicitor

**Reporting to:** Head of Private Client Department

*This job description is intended as a working document giving a guideline to the major tasks to be performed. It is anticipated that the post will develop and working practices will change; in order to meet the demands of new legislation, and the requirements of the Firm. It is expected that the post holder will contribute to and assist with all future developments.*

**Overall purpose:**

To support the Wills and Estate Planning team in managing and developing profitable caseloads and providing high quality work for clients.

**Main Duties:**

Including but not limited to the following: -

Client care

* To manage a varied caseload in Wills, LPA’s and Estate Planning work and provide general support to the rest of the private client team when required;
* To ensure the highest level of professional standards and client care are provided at all times;
* To process timely transactions and effect financial controls for matters;
* To ensure good file management and administration with department files well ordered, clear and complying with regulatory and office requirements.

Staff management

* To ensure work given to support staff is appropriately set, supervised and reviewed;
* To check carefully any typed documents before sending;
* To ensure that the department complies with all risk-management procedures;
* To assist with clients of all associated fee earners to provide continuity of service;
* To ensure conducive working relationships with colleagues, clients and other associated third parties.

Administration

* To ensure that proper and accurate records are kept of time expended on matters where fees are charged on a time basis and ensure that quotations for work are approved by the Partner and reviewed on a regular basis;
* To be fully conversant with the Firm’s IT and database systems and confident in their correct usage;
* To be familiar and confident with the Firm’s accounting practices for client and office monies, cheque requests, TT transfers.

Marketing

* Actively participate in the marketing of the Private Client department in Blandford, to promote the Firm, to maintain and develop existing client relationships and to attract new clients;
* Ensure positive and professional representation of the Firm at all times.

Profitability/Financials

* To record time accurately on client files to assist fee earners to give a true reflection work undertaken, in order to contribute towards agreed team targets;

Professional Development

* To keep abreast of the latest legal and practice development
* To plan and attend relevant development courses
* To write articles for the firm (and other bodies)
* To gain accreditation where appropriate
* To ensure CPD and other training is up to date and recorded

Personal

* To keep confidential all client information
* To be positive and helpful with colleagues, clients and professional contacts of the firm
* To assist other departments and colleagues within the firm as requested
* To adhere to and familiarise themselves with the firm’s values and policies.

Other Duties

* To include other reasonable duties and tasks which are part of, and incidental to, this type of work

**Person Specification**

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| --- | --- |
| **Essential** | **Desirable** |
| Education and Qualifications   * Qualified Chartered Legal Executive or Solicitor | * Undertaken relevant professional training |
| Experience   * Up to 3 years’ experience Wills, LPA’s and Estate Planning work * Experience of handling own caseload |  |
| Knowledge and Skills   * Detailed knowledge of Private Client work particularly Wills and Estate managment * IT literate * Good client manner * Excellent organisation and time management skills * Able to prioritise own workload * Able to contribute towards improvement/changes * Good file management skills and awareness of SRA |  |
| Personal attributes   * Commercially minded * Highly motivated * Personable * Energetic and enthusiastic * Flexible attitude and approach to work * Able to work as part of a team * Commitment to the future development of the LLP * Commitment to supporting and assisting the Partners |  |
| Other  Able to travel and work at other offices |  |