

Job description

Job Title: Probate Lawyer

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 deliver high quality legal advice and run a profitable caseload.

Main Duties:

Including but not limited to the following: -

Client care

- To provide support to the probate department in respect of the production of accurate estate or trust accounts, handling tax affairs and liaising with HMRC, and general support as 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.

- 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

Essential	Desirable
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<p><u>Education and Qualifications</u></p> <ul style="list-style-type: none"> • Professional training 	<ul style="list-style-type: none"> • Legally qualified
<p><u>Experience</u></p> <ul style="list-style-type: none"> • Strong experience of Probate work • Experience of handling own caseload 	
<p><u>Knowledge and Skills</u></p> <ul style="list-style-type: none"> • Detailed Probate knowledge • 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 	
<p><u>Personal attributes</u></p> <ul style="list-style-type: none"> • 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 	
<p><u>Other</u></p> <p>Able to travel and work at other offices</p>	