

JOB DESCRIPTION

Title: Solicitor (Private Client)

Responsible for: //

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PURPOSE OF ROLE

To provide comprehensive and articulate legal support to clients, ensuring a high standard of service is consistently delivered in line with the firm's procedures. To seek to identify means of continuous improvement for self and the wider firm.

PRINCIPAL DUTIES AND RESPONSIBILITIES

1. To meet with clients, take Will instructions and draft simple Wills and life interest Wills.
2. To handle and register completing Lasting Power of Attorney paperwork including registration of enduring power of attorney documents, assessment of mental incapacity and steps to take in this regard.
3. To deal with basic Court of Protection applications for Deputyship appointments.
4. To prepare and process applications for Grant of Probate and Grant of Letter of Administration applications, including the completion of IHT 205s, IHT 217s and Statements of Truth.
5. To deal with the administration of estates, including intestacies. To complete paperwork relating to estate work, including the preparation of letters to asset holders, clients and beneficiaries, drafting applications to include IHT400s (taxable, non-taxable and supplemental pages) as well as related documents such as Power Reserved Notices, Renunciations and Affidavits.
6. To carry out work to the highest possible standards, adhering to and implementing Law Society and firm guidelines and regulations including inter alia those on client care, time recording, billing, disbursements, collection of bills, confidentiality and client and office accounts.
7. To ensure the confidentiality and security of all firm and client documentation and information.
8. To ensure that clients and executors are regularly updated as to the current situation of their case/matter even if it is going through a period of inactivity.
9. To handle telephone calls effectively and efficiently.
10. To ensure that all complaints are dealt with professionally, promptly and in accordance with firm policies.
11. To maintain files in a neat and orderly state and in accordance with firm policies and to ensure that each file is reviewed regularly.
12. To ensure that documents are completed in accordance with firm procedures.

JOB DESCRIPTION

13. To understand the obligations relating to client accounts and ensure bills, payments and receipts comply with the Solicitors Accounts Rules and the firm's rules.
14. To maintain clear and precise communications with other members of staff.
15. To take positive steps to ensure that existing clients are aware of the various types of legal work carried on by the firm.
16. To ensure good working relationships with external institutions and organisations.
17. To carry out any other duties as may be allocated by the Partners.

PERSON SPECIFICATION

Skills, Experience & Knowledge Required

1. A comprehensive understanding of Law and the legal context, including reference to resources to maintain continuous professional development.
2. A grasp of more complex Will documents containing trusts.
3. Knowledgeable of the income tax and capital gains tax issues relating to estate administration.
4. Comfortable in undertaking home visits including care homes.
5. Ability to work within a team and interact effectively with others.
6. Confident communicating with individuals at all levels, both verbally (telephone and in person) and in writing.
7. Articulate with a high level of attention to detail.
8. Organised and able to handle a busy and varied workload.
9. Committed to a high level of client service.
10. Proactive and tenacious in seeking to resolve client matters, irrespective of their complexity or nature.
11. Computer literate in the use of Microsoft Office, including Word and Excel.
12. Experience of using legal software, including SOS case management and Isokon, would be desirable.
13. A can do attitude and willingness to learn new systems/processes.

Summary:

The details outlined in this job description reflect the content of the post at the date the job description was prepared. It is inevitable that over time the nature of a defined job role will change, existing duties may be lost and other duties gained without changing the general character of the work or level of responsibility entailed. It is intended that this job description will be revised from time to time in discussion with the post holder.

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In addition, you may be expected to perform other duties commensurate with this position or as required to assist the business needs. Any additional tasks will be kept within your abilities and skills range, and training will be provided if necessary. Such agreement should not be unreasonably withheld.