

## Job Description

**NAME:** //

**JOB TITLE:** Legal Secretary

**DIVISION:** Private Client

**OFFICE:** Bromsgrove

**RESPONSIBLE TO:** Fee Earner/Divisional Head

### PURPOSE OF ROLE

To provide effective administrative support within the Private Client division, carrying out work to the highest possible standards through adherence to the firm's guidelines and policies. To be committed to a high level of client service and strive for continuous professional development.

### PRINCIPAL DUTIES AND RESPONSIBILITIES

#### Tasks and Activities:

1. To handle new client enquiries on the telephone or in person.
2. To speak with clients on the telephone, taking messages where appropriate and helping progress matters.
3. To close files, including the registration of wills on Certainty Database.
4. To update the LPA and Will database, and other required records.
5. To handle the storage of wills and LPAs.
6. To allocate post to files ready for processing by the fee earner.
7. With training, to support with the chasing of clients for payment of costs/disbursements where appropriate.
8. To undertake filing and scanning of documents, saving these as appropriate to the firm's case management system.
9. To assist with diary management, client continuity, file opening, engrossing of wills/deeds and documents ready for appointments.
10. To undertake basic drafting of documents and due diligence where needed.
11. Any other duties and assistance commensurate to the role, as required from time to time.

#### Generic Responsibilities and Expected Standards:

1. To assist with the implementation of good working practices, maintain a high standard of work and client service/care within your area of responsibility, in accordance with the firm's policies, procedures and guidelines and/or as directed by your line manager.
2. To use initiative on all matters.
3. To ensure confidentiality and security for all firm and client documentation and information.

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4. To undertake any specific training course as and when required.
5. To effectively demonstrate the firm's values and behaviours at all times.
6. To maintain clear and precise communications with other members of staff and assist other secretaries when required.
7. To develop good working relationships with external institutions, organisations and other third parties.
8. To ensure that any equipment supplied for the purpose of your work (including computer, printer/copier, franking machine and post systems) is used correctly, maintained and any defects/faults are reported.
9. To ensure that Health & Safety principles and safe working practices are followed at all times. Employees have a legal duty that gives them responsibility, so far as is reasonably practicable, to ensure that they do not endanger themselves or anyone else by their acts or omissions.
10. To cooperate with the firm on Health & Safety matters and do not interfere with or misuse anything provided for health, safety and welfare purposes.
11. To keep areas of work clean and tidy.
12. All employees have a responsibility to carry out their work with due regard for the environment.
13. To assist the office with responsible practices regarding fire marshals and first aid.

## **PERSON SPECIFICATION**

### **Skills, Knowledge, Experience and Attitudes**

1. A proficient level of literacy and numeracy.
2. Experience of data entry and/or text processing. Touch and audio typing experience desirable.
3. IT literate with experience of the Microsoft Office suite of applications, including Word, Excel and Outlook.
4. Experience of working within a team environment.
5. Ability to interact effectively with others, both face to face and over the telephone, including an excellent telephone manner and comfortable dealing with clients.
6. Proactive and able to work on own initiative.
7. Organised and methodical with the ability to multi-task, prioritise and work in a fast paced environment.
8. Excellent attention to detail and accuracy.
9. Committed to excellent client service.
10. Focused on achieving goals, adopting a can do attitude.
11. Highly motivated and willing to learn.
12. An understanding of and adherence to General Data Protection Regulation (GDPR),

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and maintaining confidentiality and integrity at all times.

### **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.

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.