



## Legal Assistant Job Description

Job Title:	Legal Assistant
Responsible to:	Head of Private Client Department
Hours:	Full Time

This is an exciting opportunity to excel in a client facing and administratively intensive role within a firm that actively strives to be the best in the industry and is committed to the development of its people.

### Summary of role

Assisting fee earners with the preparation and completion of Wills, Lasting Powers of Attorney, Court of Protection, the Administration of Estates and Trusts, ensuring the quality and consistency of client care and file management.

The Legal Assistant will take an active interest in and obtain a thorough understanding of all aspects of client requirements to provide exceptional service levels to both the fee earners and clients.

In line with policies and procedures, key responsibilities include:

- Accurate time recording of chargeable hours, documenting work in file notes and attendance notes
- An understanding of mental capacity and how it relates specifically to Wills, LPAs and Court of Protection
- Drafting different Will structures and also different types of LPAs and supporting solicitors in meetings and with the client relationship generally
- Responsibility for keeping a central record of matters where the partners in TW are either Executors or Attorneys and ensuring that is reviewed and updated regularly
- Having empathy and patience in assisting clients with anything
- Ability to work and communicate effectively with a wide range of individuals
- Ability to manage workload and prioritising and reprioritising when urgent issues arise
- Releasing original documents to clients on their request in line with the firm's procedures



- In relation to Probate, the role would require empathy and understanding when speaking with clients as losing a loved one is very difficult
- In relation to management of affairs, the role would require empathy and understanding when speaking with clients who may not have capacity as well as their families
- Ability to be pro-active in the administration of an estate or management of client's affairs under a power of attorney or deputyship
- Ability to understand the Probate process and completing Inheritance Tax forms for review by a fee earner.
- Ability to understand the Court of Protection process especially when applying for deputy or completing annual reports
- Make telephone calls to financial institutions and to be pro-active with their response
- Drafting occasional letters and chasing fee earners for review of documents.
- General assistance with matters as and when required
- Use of initiative to follow up on tasks to ensure they are seen through to completion and clients and fees earners are chased accordingly

### **Other duties and responsibilities**

In addition to providing support to the fee-earners to whom they offer services, a Legal Assistant will also provide assistance to their immediate colleagues in the department and, where practical, other departments.

Team duties will therefore include:

- Assisting others in the department whenever there is spare capacity or it is evident that a colleague needs assistance with their workload
- Picking up telephone calls for other members of the department when they are away from their desk or in meetings
- Help schedule meetings in the fee earners absence
- Participating in a lunch time telephone rota within the Legal Assistant team
- Assisting other members of the department, both pro-actively and at the request of the Team Leader
- Working effectively with other legal and support departments as required
- Any other duties as reasonably requested by the Solicitors or Team Leader, or a person of an appropriate seniority.

### **Person Specification**

A Legal Assistant has responsibility to ensure that their skill set is up to date and they are familiar with the firm's departments, key personnel, clients, internal systems and procedures. This will ensure that the Legal Assistant is able to carry out his or her role effectively and, where appropriate, discuss any training requirements with the Team Leader.



In addition to this, they should have:

- Secretarial/Legal Assistant experience within Private Client to include Court of Protection.
- Accurate typing speed of at least 60 words per minute
- Advanced knowledge of Microsoft Word, Outlook, Excel, research tools and other systems implemented by the firm
- Excellent communication, organisational and team skills
- Experience of building and maintaining internal and external client relationships
- Organised and able to prioritise workloads
- Accurate and with keen attention to detail
- Takes the initiative
- Able to remain calm under pressure and work to tight deadlines
- Have a positive approach to daily tasks and have a solution focussed working method

### **Personal attributes required in line with the firms core competencies**

The firm has a comprehensive set of core competencies that represent the behaviours we require from all staff within the firm. Incorporated within this framework are our core values of;

- Honesty and integrity
- Open to change
- Pursuit of excellence
- Support of others

The core values are central to the ethics of our firm and must be displayed to the highest level at all times. The individual core competencies for this role are aligned to those expected of a Paralegal in the core competency framework.

### **Hours**

Normal working hours are 9am to 5.30pm. Staff will be expected to be flexible and to arrive earlier and stay later when the job or business requires. There may be an opportunity to work alternative hours upon request, dependant upon this meeting with the business needs.