

## EMPLOYEE JOB DESCRIPTION

**Job title:** Apprentice

**Department:** Private Client/Head Office

**Reports to:** Head of Private Client/Director of Finance and HR

### Job Summary:

To provide administrative support to the Private Client Department and the Firm in the delivery of an efficient, high quality service to its clients. There will be a particular focus in assisting with the roll out and delivery of a new service to clients, whose working title is the Estate Planning Review Service.

You will work in a supported learning environment to develop the skills and knowledge required to perform your role. You will work under the direction and supervision of Solicitors and Probate practitioners to provide client services whilst exhibiting the firm's strong client care ethos.

The role will provide you with the skills and knowledge of Private Client legal services, Administration and client care to enable you to support the work of the Private Client Team and provide additional capacity for the department.

### KEY TASKS

#### In relation to the Estate Planning Review Service:

- Where clients have decided to use the service, arranging meetings and ensuring co-ordination of diaries of Solicitors and other members of staff
- Collating and checking incoming information from clients to ensure necessary information has been received in advance of meeting
- Where necessary, contacting clients by telephone/email to request outstanding information
- Creating document pack for Solicitor to review in advance of meeting
- Ensuring video meeting has been arranged successfully
- Assisting clients in setting up necessary software/technology for their successful attendance at virtual meeting
- Gathering feedback following conclusion of virtual meeting

#### General Office Duties

- Collating, scanning and allocating incoming post
- Preparing payment requests

- Preparing charge notes using legal office software
- Collating beneficiary identification and data input tasks to assist the Probate practitioners as required.
- Closing and archiving completed files
- Preparing meeting rooms for visits by clients
- Responding to clients' queries through contact in person, by telephone or in writing in a professional and friendly manner;
- Ensuring strict confidentiality of all the firm's and clients' documents and information at all times.
- Attending to clients in person, on the telephone or in writing, in a professional and friendly manner at all times in keeping with the firm's excellent standards of client care.
- Assisting Receptionists and providing cover for reception as required.
- Other duties as required, in line with your learning and development in the role

## **RESPONSIBILITIES**

- Take ownership of assigned tasks and ensure high levels of accuracy
- Be committed to observe, learn and understand a wide range of legal and administrative processes
- Constructively take part in departmental meetings and any seminars as required
- Be committed to demonstrating the firm's high standards of client care at all times
- Develop a sense of continuous improvement while undertaking any task
- Record all communications with clients on the file, keep records and update the File Manager promptly and accurately
- Actively participate in your own development plan under the supervision of the Department manager.
- Ensure that duties are undertaken in line with the requirements of the firm's Privacy Policy, the Data Protection Act and other legislation.
- Carry out your duties and responsibilities in line with the firm's Health and Safety protocols
- Undertake and successfully complete suitable academic college courses

The above list is not exhaustive and other tasks within the scope of the post and capabilities of the post holder may be allocated from time to time.

## **[Person Specification]**

### **Qualifications**

GCSE English - Grade 5 or above  
 GCSE Mathematics – Grade 5 or above  
 A Level qualification or equivalent study