Temple Heelis
SOLICITORS

EMPLOYEE JOB DESCRIPTION

Job title: Office Assistant/ Receptionist

Department: Windermere and Conveyancing

Reports to: Managing partner

Location: Windermere Office (in an emergency Ambleside office cover may be needed)

Job Summary:

To provide administrative support to the Windermere and Ambleside branch and Conveyancing department and from time to time complete tasks for other departments in the firm as required.

Key Tasks:

General office duties

- Assisting with opening, sorting and distributing the incoming mail.
- Sorting, preparing and franking the outgoing mail ready for collection.
- Taking banking to the post office as required
- Archiving of files.
- Retrieving and returning archived files from storage and maintaining up-to-date records of the whereabouts of files.
- Greeting clients and answering calls on the switchboard.
- Managing the meeting room, including ensuring that it is neat and tidy before and after scheduled meetings and suitable refreshments are on hand.
- Sending, receiving and distributing emails, faxes, photocopying, and post and undertaking general clerical work
- Scanning incoming post and saving it to the correct file.
- Liaising with employees at all levels and clients to relay messages and assist with enquiries etc both face-to-face and on the telephone.
- Maintaining a high level of confidentiality regarding client circumstances and work undertaken by the firm.
- Typing of notes and correspondence from notes or dictation.
- Undertaking errands as required.

Wills and Deeds Administrator

- Administrator of deeds and wills – Listing and storing all deeds wills and trust documents

Payment verification duties

- This is an important role in our daily banking process.
- To be the main person undertaking verification of payments on Metro bank. The task includes carefully checking bank payment details against CHAPS, BACS and Faster payment e chit requests and bank detail evidence on DPS, verifying the payment and forward the instruction to the next person in the authorisation chain. Training to be provided by Head of Accounts. (step by step notes attached.)
- Chasing up of authoriser to make sure that the payment has left the bank.

Conveyancing Department support duties

File opening

- Setting up all new clients and ensuring this is done accurately and duplicated clients are kept to a minimum,
- Drafting client care letters for checking by the fee earner/assistant in the relevant team
- Dealing with client care received - scanning signed documents, logging ID etc.
- Checking completion statements as requested by fee earners or assistants
- Sales – requesting/sourcing deeds, requesting initial redemption statement, chasing up missing items from the client care received, e.g. funds, mortgage details, ID.
- Sales – ordering office copies etc to enable contracts to be drafted, initial letter to o/s, drafting contracts as requested
- Purchases - requesting missing items from client care received, e.g. ID, search fees
- Purchases - submitting searches
- Sales and purchases – making phone calls to clients and estate agents as requested

Post completion

- Sales – dealing with post completion requests for evidence of discharge of mortgages or missing transfer deeds etc, sending deeds to buyer's solicitor if required
- Purchase – prepping up AP1s and scanning on all necessary documents for approval by fee earner/assistant
- Dealing with HMLR Requisitions
- Dealing with ledger balances to be cleared before archiving
- All archiving of files and deeds