

PROBATE ASSISTANT

Position – Full time, Office based, Kendal

Salary – Competitive

You will be working closely with our leading Private Client solicitors and our team of experienced Probate Administrators and Legal Secretaries to **provide a first-class service for our clients**.

Much of your work will involve working on Estate Administration files, from file opening through to final distributions and all the steps in-between so you need to be ready for anything. The work will involve letter drafting, form completion, typing up of attendance notes, regular outgoing telephone calls and emails as required by the team so **accuracy is very important as well as a friendly and professional manner**.

You will be making calls to financial institutions and government departments to check on a case's progress, and where required liaising with clients and beneficiaries. You will ensure our client database and case management system is updated accurately and assist with incoming post, scanning, filing and incoming calls to the department. **Working as a team is very important to us**.

You will assist with the formal paperwork required for applications to the Probate Court and the Court of Protection, and with the preparation of Lasting Powers of Attorney as required. You will be **keen to learn and progress** to assist with more complex drafting of Deeds and Land Registry documentation over time, under the supervision of a Private Client solicitor.

We will offer you the opportunity to develop your legal knowledge and administration skills in a supportive and inclusive environment. The skills and experience we would like you to bring to the role include:

- Accuracy, great organisational skills and excellent time management skills
- The ability to prioritise tasks and manage your own workload independently.
- Excellent verbal and written communication skills, and proficient with numbers
- A good working knowledge of Microsoft office packages, including Excel
- The ability to demonstrate empathy, patience and understanding
- Being a great team player but also able to work without supervision
- Able to uphold the values and ethos of the firm at all times

Please apply to Emma Rawlinson with a CV and covering letter to careers@templeheelis.co.uk

Number of positions available – 1

Closing date – 29th February 2024