Part Time Private Client Solicitor

Office Location: 84 Eccleston Square, London SW1V 1PX

Responsible To: HOD

Salary: Negotiable, dependant on experience

Working Hours and Arrangements:

The position is currently mainly home based for 21 hours per week. One day must be a Friday, with the other two days negotiable. Subject to government restrictions, attendance at the office and for client meetings is an essential part of the role when required.

During the COVID pandemic staff working in the office are encouraged to travel outside of peak times.

When working from home, an "Agile Working Day" running from 7.30 a.m. to 7.30 p.m., Monday to Friday has been adopted. This is divided into 'flexible' and 'core' hours as follows:

Flexible period in which you can work	07.30 – 10.00
Core period in which you must work	10.00 – 12.00
Flexible period during which a 30 minute break must be taken	12.00 – 14.00
Core period in which you must work	14.00 – 16.30
Flexible period in which you can work	16.30 – 19. 30

Job Purpose:

Reporting to the Head of Department, the principle purpose of the role is to deliver high quality legal services to clients on a full range of private client matters, including Wills, Inheritance tax planning, Trusts, Probate, Powers of Attorney, Court of Protection and Elderly Client matters. By working collaboratively with all members of the Private Client department, the post-holder will provide our clients with a service that is of a high standard, ensures the department works effectively and promotes a professional image of the Firm at all times

The role requires management and control of a caseload, workload, and risk management in relation to the role. It includes helping to develop relationships across departments, as well as interaction with other law firms and professionals. The role also involves working with the management team from time to time, assisting in the design, delivery and implementation of system changes, workflow and process improvements, as well as being involved in business development activities to promote the Private Client department and the business as a whole.

Job Description

Principal duties:

- To operate within a departmental structure delivering a consistent, excellent standard of legal services to our clients.
- Undertake fee earning work, working both independently and as a member of the team and provide a profitable contribution to the work of the department.

- Manage private client matters, with a particular focus on:
    - preparation of wills and trusts;
    - administration of estates and trusts;
    - advising on trusts for pension and life insurance policies;
    - advising on tax matters with emphasis on Inheritance Tax mitigation;
    - advising clients with regard to elderly issues, from LPAs to Deputy Orders;
    - estate planning for asset protection with a focus on tax minimisation, care fees and third party creditors;
    - managing relationships with IFAs, accountants and clients.

- Maintain high standards in the processing of client work, both in respect of professional standards and client care,
- Attending upon clients to take instructions and advising on the most appropriate course of action to meet clients' needs; taking appropriate action in executing clients' instructions in a timely manner.
- Ensure the confidentiality and security of all company and client documentation, information and effects.
- Maintain good professional working relationships with external institutions and organisations.
- Comply with the Firm’s policies in the carrying out of duties and assist Partners and other fee earners in achieving a smooth output of work.
- Liaise with the HOD and other staff to ensure adequate cover within the department at all times, and to attend to clients of other fee earners in their absence, where this is appropriate.
- Achieve agreed financial targets, both in respect of fee income and the recording of chargeable hours.
- Financial control of your own matters with particular regard to cash flow through collection of monies on account and billing procedures.
- Recognise fee-earning opportunities and develop as appropriate.
- Participate in the growth and future development of the department and Firm, assist in building the client base through business development activities and market the firm’s services.
- Maintain orderly and up-to-date electronic files and comply with the firm’s policies and procedures on paperless file management.
- Use the firms IT, case management and dictation systems (SOS & BigHand).
- Complete time recording and other management records required by the firm.

<u>General Practice, Training & Compliance</u>

- Ensure compliance and the SRA Code of Conduct are adhered to in all activities.
- Be accountable for own personal development, seeking out opportunities to learn new skills in order to continuously improve and progress and keep fully up to date with relevant legislation and practice.
- Assist in the induction/supervision of new staff, providing information, advice, guidance and training as required in accordance with your experience and areas of responsibility.
- Comply with individual responsibilities for health and safety at work, reporting any problems or areas of concern to the Practice Manager, Staff Partner or Thomas House as a priority.
- Carry out any other duties as reasonably requested by the Partners, HOD, other Fee Earners, Practice Manager, Finance Manager or other colleagues, as may reasonably be expected within the scope of the role.

PERSON SPECIFICATION

	Essential	Desirable	How Measured
Qualifications	• 3-5+ years PQE • Law Degree, LPC and completed Training Contract • STEP qualified, working towards or willing to work towards	• SFE accredited	CV
Skills	• Excellent interpersonal skills in order to build good client relationships, identify opportunities and network effectively • Excellent verbal and written communication skills • Highly organised and efficient approach to work • Able to multi-task and respond positively to a large workload • Strong prioritisation skills to enable competing deadlines to be met • Proficient at growing new business and assisting in the delivery of firm wide business development and events	• Presentation and public speaking skills.	Interview
Knowledge	• Understanding of mainstream private client matters to include, wills, powers of attorney, Tax planning, Court of Protection practice, estate administration and trusts • Good computer literacy, including knowledge of case management systems, digital dictation and Microsoft Office Suite applications	• Hands-on use of SOS & BigHand	Interview
Experience	• Relevant and transferrable experience acting in the private client sector • Previous experience of managing a caseload of private client matters • Able to use initiative and demonstrate confidence built upon previous matters and achievements		CV & Interview
Personal Qualities	• Self-motivated, diligent, dedicated and driven to succeed • Proactive and positive attitude • Reacts well under pressure • Adept at handling conflicting priorities effectively • High level of integrity and empathy • Hardworking, proactive and positive attitude. • Accurate, with good attention to detail • Flexible, adaptable and willing to help, whatever the task • Ability to work independently and as part of a team • Committed to providing exemplary levels of service to clients	• A client following	Interview