

## **Wills and Probate / Private Client Fee Earner**

**Department – Wills and Probate**

**Salary - Competitive commensurate with experience plus discretionary bonus and other benefits**

**Location – Ellis-Fermor and Negus, 5 Market Place, Ripley, Derbyshire, DE5 3BS**

### **JOB DESCRIPTION**

#### **Job Purpose**

- To advise on a range of private client matters including wills, probate, Court of Protection cases and LPAs,
- To undertake research, prepare documents and correspondence, interview clients, visit properties, negotiate on behalf of clients and meet billing targets
- To uphold our values of Honesty, Respect and Teamwork, and work in accordance with the Solicitors Regulation Authority (SRA) Principles and Code of Conduct
- To contribute to our mission of establishing lifelong relationships with all our clients by anticipating and responding to their needs for quality legal services

#### **Main Duties**

- 1 To manage a varied caseload of private client matters including:
  - a) Wills
  - b) Probate
  - c) Lasting Powers of Attorney
  - d) Court of Protection cases
- 2 To take a proactive approach in building professional relationships with clients and other contacts
- 3 To maintain and promote the good image and reputation of the firm
- 4 To assist colleagues, Directors and Heads of Department with marketing and training events and initiatives
- 5 To manage and supervise junior staff and support staff as required including assisting with recruitment, training etc
- 6 To use the case management software and our billing and other financial processes effectively

#### **General Duties**

- 1 To work in a flexible way to ensure that the workload is completed and to undertake any other jobs commensurate with the level of the post.

- 2 To establish, maintain and enhance team-working with colleagues and staff of Ellis-Fermor and Negus
- 3 To keep confidential all information about individuals and the business of Ellis-Fermor and Negus and work within the guidelines of the GDPR.
- 4 To abide by our Equality, Diversity and Inclusion, Health and Safety, Anti Money Laundering Policies and all other relevant policies

## ROLE SPECIFICATION

	CRITERIA
<b>Experience</b>	5-10 years PQE in Private Client Matters as a Solicitor or Legal Executive
	Experience of working on own initiative and as part of a team
	Experience of establishing and building professional relationships with clients and other contacts
	Experience of managing own workload, meeting deadlines and prioritising appropriately
	Proven record of meeting billing targets
<b>Skills and Abilities</b>	Excellent written and verbal communication skills
	A methodical and detailed approach with a high level of accuracy
	Excellent IT skills
	An empathetic and caring approach
	Self-motivated, proactive and forward thinking
<b>Other</b>	Qualified solicitor or Legal Executive
	Good understanding of Anti Money Laundering responsibilities and GDPR requirements
	Sympathetic to our ethos and heritage
	Satisfactory DBS, Credit Check, references and ID Check

**Line Manager – Head of Department / Cluster**