

SECRETARY

Department - Wills and Probate / Private Client

Location – Ellis-Fermor and Negus, 6 Derby Road, Belper, Derbyshire, DE56 1UU

Hours - 35 hpw (Monday – Friday, 9am – 5pm, 1 hour lunch)

Salary – Circa £24,000 pa depending on experience

JOB DESCRIPTION

Job Purpose

- To provide the fee earner(s) with all reasonable assistance to enable them to provide an efficient and professional service to our clients
- To provide a professional secretarial service for the Department
- To ensure high levels of customer care for clients over the phone and face to face
- To help to turn enquiries into cases by being proactive in relation to response times and providing high quality services to clients
- 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 build a professional and mutually supportive working relationship with the fee earner(s)
- 2 To effectively manage and support the fee earner(s) with the management of their diary ensuring that their whereabouts are known, that clients are seen as soon as possible and that files are actioned in a timely and efficient way
- 3 To provide professional secretarial support to the Wills and Probate Department including:
 - Preparing letters, emails, reports and other documents from digital dictation including audio
 - Submitting, and then monitoring, online applications to The Probate Registry and HM Land Registry
 - Photocopying, faxing and scanning documents
 - Opening and closing files and maintaining filing system
 - Sending emails in accordance with fee earner's instructions
 - Checking documents for accuracy and completeness
 - Operating a range of computer packages including Office, Practice Management System (PMS), Case Management System etc
- 4 To deal with enquiries from new and existing clients and external agencies and provide a high level of client care service, including:
 - Seeing new clients who call in for appointments, taking initial details and arranging appointments
 - Dealing with telephone enquiries / emails from new and existing clients, dealing with

their needs and making appointments

- Dealing with telephone / email enquiries from other agencies

5 To provide cover in other teams including on Reception as required

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
Experience	Experience providing a secretarial service, ideally within a legal services / Wills and Probate environment
	Experience of audio and copy typing
	Experience of working with a range of software packages
	Experience of providing high levels of client care face to face, over the telephone and via email
	Experience of handling confidential information appropriately
Skills and Abilities	Excellent IT skills and the ability to learn and use new software
	Ability to work quickly with a high degree of accuracy
	Excellent written and verbal communication skills
	Ability to handle interruptions professionally and maintain concentration
	Ability to work to deadlines effectively and manage and organise own workload and prioritise accordingly
	Ability to multitask efficiently
	Ability to help to turn enquiries into paid for work through excellent response times, high levels of customer care etc
Ability to understand and work effectively with a diverse customer base	
Other	Good understanding of Anti Money Laundering responsibilities and GDPR requirements
	Satisfactory references and other pre-employment checks including credit check, identity check etc
	Sympathetic to our ethos and heritage

Line Management Responsibilities - None

Line Manager – Head of Department / Director