

Name:			
Job Title:	Private Client Practitioner	Salary:	£
Reports to:	Alex Jennings		
Hours of Work:	Mon-Fri 9am-5pm	Place of Work:	New Milton (Lymington and Lyndhurst upon request)
Summary of Position:	Processing legal matters with minimal supervision in the private client team.		

Responsibilities

- Handling probate matters from commencement to conclusion
- Preparing estate accounts
- Preparing tax returns: personal, trust and estates
- Powers of attorney and Deputyships
- Writing Wills
- Visiting clients at home or hospital
- Dealing and liaising directly with clients and third parties as required
- Working on own initiative under a tight schedule and managing own diary
- Dealing with telephone enquiries and accurately recording telephone conversation by way of attendance notes
- Typing – Word and Excel skills for preparation of letters/forms that the firm will issue.
- Work in line with standardised administration processes to ensure all documentation are accurately produced.
- Providing holiday and sickness cover for other members of the private client team upon request.
- Billing clients and credit control
- Assist in the creation, development and implementation to improve processes and procedures for the team and firm
- Time recording of your daily duties on client files
- Data Protection – Ensuring all documents of a sensitive nature are stored correctly including clients files, ID, Financial Information, correspondence etc.
- Communication to your manager of any problems you face whilst performing your role
- Adherence to company policy at all times (a copy of the firm handbook can be found on the computer network)
- Any other task which is reasonably requested of you by your manager or a director

Signed..... Date.....

Manager signed.....