Winston Solicitors
When Service Wins

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Job description

Position	Private client solicitor
Job purpose	To manage an existing caseload of wills, powers of attorney, deputyships, trusts and probate matters and assist with the continued expansion of the team
Reports to	Head of Private client
Accountable to	Partners and Practice Manager
Hours	Monday – Friday 08:45 – 17:30
Location	Winston Solicitors 112 Street Lane Leeds LS8 2AL

Main responsibilities

Managing your own caseload of wills, LPAs, deputyships, trusts and probate matters from inception to completion, providing high levels of client care and quality service in order to build the brand and profile of the department and firm.

1. Running your own caseload of wills, LPAs, deputyships, trusts and probate matters.
2. To plan and prioritise case and file management
3. Accurately utilising and updating the case management system.
4. Communicating internally with the private client team, support staff and finance department and externally with clients and other third parties
5. Adhering to the Anti-Money Laundering regulations, in particular verifying client and other third parties' identification in line with the raising any potential money laundering concerns to the Compliance officer.
6. Drafting legal documentation.
7. To adhere to the firm's financial policies of invoicing.
8. General administration.
9. Witnessing and certifying documents for clients.
10. To assist colleagues in relation to complex cases and working as a team.
11. To develop and retain new clients according to an agreed development strategy.
12. Working closely with the Private Client Team Leader in marketing activities to develop new clients and promote the team and firm as a whole.
13. To train and develop relevant knowledge, techniques and skills.
14. To assist in providing holiday cover.
15. Undertake any other duties relevant to the post as required

Person specification

Essential skills, experience, behaviours and qualifications

Skills

- Excellent English language and communication skills both verbal and written
- Excellent team player who is able to get on with others
- Good organisational skills with the ability to multi-task
- Ability to work autonomously
- Ability to effectively manage conflicting priorities and enjoy the challenge of managing a caseload
- High attention to detail and accuracy with figures
- Ability to make timely and well-considered decisions
- Must be adept in use of MS Office, particularly Excel and Word, internet and email, and ideally case management systems to a basic level
- Possess commercial awareness
- Ability to identify risk and carry out effective risk assessment

Knowledge required

- Knowledge of law concerning wills, trusts, estate planning, lasting powers of attorney, deputyships, probate and all other areas of private client work

Experience

- Experience of running a wills, trusts, estate planning, lasting powers of attorney, deputyships and probate caseload

Behavioural characteristics

- Capable of using diplomacy, tact and sensitivity when dealing with others
- Ability to inspire and motivate self and colleagues
- To have the initiative and desire to be able to raise the firm's profile and recognise business opportunities
- Commitment to continuous improvement and providing a high quality service
- Taking ownership for informed decisions and delivering quality outcomes
- High degree of personal integrity and commitment to fairness, diversity and equality
- Willingness to participate actively in training and development
- Genuine willingness and desire to progress themselves and the team/business they work within
- Willingness to lead by example to promote excellence

Qualifications required

- 3 + years PQE

Desirable skills, experiences and qualifications

Skills
- Some knowledge of contentious probate

Experience
- Able to demonstrate experience of marketing and developing a private client team

Qualifications
- SFE or STEP membership