

NO AGENCIES PLEASE

Job Description

Level 3 Paralegal Apprentice (Probate Practice Pathway) for the Estate Administration team Private Client Department

Introduction

The Private Client Department is looking to recruit a Level 3 Paralegal Apprentice to assist more senior team members in administering our clients' estates, and to support the department generally at an administrative level.

Duties and Responsibilities

General day to day duties will include assisting with:

- estate administration work, including the collection of assets and identification of liabilities, dealing with third parties such as banks, accountants, valuers and financial institutions to obtain date of death valuations via correspondence/telephone calls as required, applications for grants of probate and letters of administration, and the associated tax reporting and compliance; and
- the general administrative work of the department, to include onboarding new clients and the associated file opening and compliance work, scanning, notetaking, and preparing preliminary drafts of letters, emails and other documents, dealing with enquiries and taking and relaying messages, maintaining orderly files and papers, electronic filing, as well as closing and archiving files.

The Training

The successful candidate will be appointed a senior member of the estate administration team as mentor and be trained by and primarily work under her supervision.

A structured programme of tuition will be provided by an accredited training provider over a two year period. External training will be either for one day a week or on block release or be supplemented by private study, periodic assessments and on the job training.

On completion of the apprenticeship, the successful candidate will continue to be given help to develop and can go on to further training or employment.

The Individual

The ideal candidate will have the following skills and attributes:

- good academic record including 3 A-levels (BBC minimum) and GCSE Maths and English grades A* - C / 9 - 4;
- good administrative skills, an eye for detail and the ability to prioritise a workload;
- good working knowledge of Microsoft Office packages e.g. Excel and Word;
- excellent command of both spoken and written English and numeracy skills;
- experienced IT user;
- ability to work as part of a team or on their own;
- well organised and able to act with discretion when dealing with confidential information;
- a good telephone manner and customer service skills; and
- positive outlook, flexibility and appetite for taking on challenges.

The Client Base

Whilst there is no such thing as a typical client of the firm, the core profile of clients who are looked after by the firm are wealthy families, often with a number of family trusts and grant making charitable trusts. Their assets might include shares in family owned businesses, quoted investments, bespoke open ended investment companies, hedge funds, or landed estates and property. We also act for business executives, entrepreneurs who have generated their own wealth, and families whose assets have accumulated over the generations, and who may have assets in other jurisdictions.

The Private Client Department

The Private Client Department has two sections, the legal section and the trust and tax section. These two sections work closely together on our clients' affairs so as to provide a seamless service.

The legal section comprises solicitors, legal executives and secretaries. There are currently seven partners, one senior professional support lawyer, five senior associates and four associates, two chartered legal executives (specialising exclusively in probate and estate administration) and one trainee solicitor in the section.

The tax and trust section consists of fourteen qualified and unqualified trust and tax accountants and practitioners, including two chartered accountants and tax advisers, one apprentice and three secretaries.

The Firm

Payne Hicks Beach is a 34 partner firm of solicitors based in offices in New Square, Lincoln's Inn. In total the firm comprises about 190 staff. The firm provides specialist legal services to private and commercial clients. We are best known for our family and private client work and are widely regarded as one of the very best of the small number of firms in the UK who provide these specialist services at the highest level. We also have an excellent reputation in many other areas of law (rated in both Chambers and Legal 500), including trust and estate litigation.

More information about the departments and the work of the firm may be found on our website, the address of which is www.phb.co.uk

Please contact Janice Okuns, HR Manager, for further information.

Remuneration Package

Salary: Market rate

Other benefits: 4 x Life Assurance

Permanent Health Insurance

Medical Insurance (after 1 year qualifying period)

Medicash Scheme (after 1 year qualifying period)

Pension Scheme (after 1 month qualifying period). The firm contributes to a Personal Pension Plan.

Interest-free season ticket loan after 3 months

Other

We are open to flexible working arrangements.