PAYNE | HICKS | BEACH

PROBATE EXECUTIVE
for the Private Client Department

Introduction

We are seeking an individual with good experience in the administration of estates, to work alongside three senior fee earners and one probate apprentice in the Estate Administration section of the Private Client Department.

Duties and Responsibilities

The individual will need to be able to assist with running a busy workload of probate and administration work, consisting of very complex and high value estates, and specifically the following duties and responsibilities, under the supervision of one of the senior fee earners in the team:

- Co-ordinating 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;
- Preparing applications for letters of administration either on HMCTS' online portal or via postal application where appropriate;
- Preparing and filing initial and supplementary inheritance tax forms and applications for relief, and negotiating valuations and tax computations with HMRC;
- Reporting estate income and capital gains to HMRC, and preparing statements of income for beneficiaries;
- Preparing and maintaining estate administration accounts; and
- Dealing with the distribution of funds to beneficiaries in the appropriate manner.

Conduct

The candidate will be expected to:

- Adhere to the firm's policies on Equality and Diversity;
- Adhere at all times to the Solicitors Code of Conduct, Solicitors Accounts Rules, Deposit Interest Rules, and all other relevant practice rules and statements of good practice issued by the Law Society or other appropriate body; and
- Attend appropriate training events and professional skills courses as prescribed by the firm.

The Individual

The ideal candidate will have the following skills and qualifications:

- appropriate professional credentials, as a Solicitor or member of the Chartered Institute of Legal Executives;
- detailed and experiential knowledge of inheritance tax rules, accounting and procedure, as well as Income and Capital Gains Tax compliance in the context of estate administration;
- a proven record of having administered, or assisted with the administration of complex, and high value estates;
- good administrative skills and an eye for detail;
- the ability to work as part of a team or on their own;
- good customer service skills;
- a good telephone manner;
- excellent command of written English and numeracy skills; and
- computer literacy and specifically experience with Excel.

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. The legal section consists of solicitors and legal executives, and the trust and tax section comprises qualified and unqualified trust and tax accountants and practitioners. These two sections work closely together on our clients' affairs so as to provide a seamless service.

The legal section of the department currently consists of seven partners, one consultant, nine associates and senior associates, two chartered legal executives, one trainee and one apprentice. In addition to dealing with the legal requirements of our clients this section is also responsible for the department's estate administration practice.

The Firm

Payne Hicks Beach is a 35 partner firm of solicitors based in offices in New Square, Lincoln's Inn. In total the firm comprises 170 people. The firm provides specialist legal services to private and commercial clients. We are very well 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).

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

Remuneration Package

Salary:	To be discussed
Other benefits:	4x Life Assurance Permanent Health Insurance Medical Insurance (after 1 year qualifying period) BUPA Cashplan (after 1 year qualifying period) BUPA Health Assessment (after 1 year qualifying period) Pension Scheme. The firms contributes to a Personal Pension Plan. Interest free season ticket loan after 3 months Cycle to Work Scheme Wellbeing Programme
Holiday:	25 days

Other

We are an equal opportunities employer.