



JOB DESCRIPTION

Paralegal - Probate



JOB DESCRIPTION

Paralegal

Position	Paralegal
Department	Probate
Reporting to	Team Leader
Office	London

Overall Purpose

You will provide secretarial, administrative and technical paralegal support to fee-earners within the team

Main Tasks

- » Carry out legal research and keep updated with changes in legislation / case law relevant to probate / private client work
- » Drafting straightforward documents such as straightforward Wills and LPAs and progressing these on behalf of the fee earners
- » Providing administrative support e.g., typing correspondence from dictation, scanning, filing, and typing attendance notes
- » Assisting with file opening and closing
- » Drafting of probate applications on the portal and assisting fee earners with the preparation of IHT forms for taxable estates
- » Assisting fee earners with day to day administration of Estates / Trusts
- » Effectively using the firm's case management system and Probate Module and taking responsibility for dealing with administration of estates, including following up with third party organisations
- » Updating the firm's Probate software, Probate Plus with figures
- » To attend to clients in a professional way on the telephone
- » To assist fee earners in client meetings / home visits as necessary
- » To take and record accurately any messages and pass on to the appropriate person without delay
- » To make appointments, arrange meetings and maintain a diary, to be checked against the fee earner on a daily basis

- » To ensure the confidentiality and security of all clients' documentation
- » To be able to advise clients of the current state of any file, if uncertain to contact the fee earner for clarification
- » To carry out the departmental client care policy
- » To bring to the attention of the fee earner any matters which are thought relevant to be considered at the monthly departmental meetings
- » To undertake any other clerical / secretarial duties which from time to time may be allocated

This job description is not a definitive list or exhaustive list of responsibilities but identifies the key responsibilities.

Job Specification

	Essential	Desirable
Education Qualifications	Educated to 'A' level standard	Law Degree and/or LPC/SQE
Experience	Two - three years' experience in a similar role	Wills & Probate experience
Personal Attributes	Well organised To have good time management skills Have excellent communication skills Can use own initiative Prioritise in a manner that is beneficial to the client and the Firm Be adaptable to varied tasks set by the fee earners Be a team player	

Competencies	Ability to work constructively under pressure Meet deadlines Have excellent interpersonal/client skills	
Other Factors	IT literate Experience of using digital dictation Experience of using legal case management systems	

11 June 2024