

# Will Specialist / Estate Planner – Law Graduate

## **Kinherit – [www.kinherit.co.uk](http://www.kinherit.co.uk)**

Kinherit is a high growth business, operating in the area of End-of-Life planning through writing Wills and Trusts. We are a market disrupting Law Firm, if you want to work in a progressive legal team re-inventing the Will-writing industry for the 21<sup>st</sup> Century we are the place for you. This is a viable alternative for ambitious graduates, wanting a fast-track career into law.

## **Experience / Qualifications**

### **Required**

- Graduate in a regulated profession such as Law or Accountancy and Finance having attained a high 2:1 or a first-class degree or diploma in financial services
- Confidence in speaking to customers over the telephone and video
- A proven track record in attaining academic, career and personal development

### **Desirable**

- Law graduate, having attained a high 2:1 or a first-class law degree
- Experience working in an office environment, it is an advantage if you have had your own customers / contacts
- Experience providing customers great service & needs based sales
- Account management experience (but not essential)
- Society of Trust and Estate Practitioners (STEP) membership / qualifications would be advantageous but not essential

### **Attributes**

- Excellent verbal communication skills, and ability to engage with customers via telephone and video
- Ability to analyse the needs of customers and advise on products they would benefit from
- Excellent attention to detail, both verbal and written, to ensure document accuracy
- Able to manage and liaise with multiple customers and introducers at different stages on different tasks
- Ability to handle sensitive information with the utmost discretion
- Ability to work as a team and independently
- Ability to use Microsoft Word, Excel and other IT systems and quick to pick up new systems

**Package**

- Competitive salary with support to progress from Specialist to Estate Planner
- Funded professional qualifications
- 25 days holiday plus 24&31 December and statutory bank holidays
- Pension
- Working hours – 37.5 hours per week including 2 set shifts of 12.30-8.30pm
- Complimentary Will and End-of-Life planning
- 30% discount for immediate family Wills and End-of-Life planning

**Business summary**

Our mission is to 'Redefine End-of-Life Planning'.

Our qualified estate planners help make sense of a whole range of legal and financial issues, creating a Will that makes sure our customer's wealth, where possible, goes exactly where they want it to. We'll then set them up to record their plans in a secure online space – their own personal Kinvault® – which is easy and instant to update anytime and simple to share and execute when they die. With Kinherit our customers can be confident that when they die whatever they want to happen will happen – with no assets or information missed and without their family having to pay or do anything extra.

Our principal strategy is to find customers via professional introducers – in particular wealth managers and independent financial advisors. A specialist's job is to take a 'lead' (typically a higher net worth individual) and give an exceptional experience as part of setting up their Will and associated planning – with advice delivered via the telephone or video.

**Role summary**

This role suits talented law graduates having attained a high 2:1 or a first-class law degree, who have ambitions to use their knowledge gained at university, and quickly apply that knowledge to support customers directly. During their studies they had more than a passing interest in Equity & Trusts plus Land Law.

We take our Specialists natural talent and support them with attaining their Society of Trust and Estate Practitioners (STEP) qualifications where they are quickly promoted to a Kinherit Estate Planner. The development does not stop there. Our Estate Planners are supported with their personal development from STEP Affiliate, on to STEP Associate through to full TEP, being promoted throughout the journey.

The day-to-day role of a Kinherit Specialist is to guide our customers through the process of establishing effective end of life plans, which protect beneficiaries from losing assets and their estate. This is achieved through producing Wills, Trusts, Powers of Attorney and other relevant documentation.

## **Role description**

As a Kinherit, Specialist in End-of-Life planning your role is to analyse our customers estates to produce the necessary documentation and gain the information to support our full handover service. This, in turn, protects our customers' money on death, whilst also saving their executors time by removing any undue hassle.

Specialists are assigned Introducers (Third Party company or an individual) who pass potential customers to Kinherit. This is the Account Management aspect of the role. Specialists influence the volume and quality of customers from their Introducers, so it is crucial to build and maintain professional relationships.

As a Specialist you provide an advice led service, being an expert in all aspects of End-of-Life planning. Often this results in additional documents being produced, such as Legal Powers of Attorney, Trusts, Business Trusts and Deeds of Severance. Following on from this process, you support customers in our revolutionary handover service using our Kinvault.