

Estate Planner / Will writer

Kinherit – www.kinherit.co.uk

We're a law firm specialising in Wills and Trusts that combines quality advice with unique technology to better protect families when their loved ones die. We've solved the problem of how best to hand over instructions and inheritance to the next generation, avoiding the distress so often experienced during probate.

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 Clients 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
- Will writing experience
- Experience working in a law firm/solicitors is an advantage
- Experience providing Clients with great service
- Experience with managing own Client base
- 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 Clients on the phone and over Zoom
- Ability to analyse the needs of Clients and advise on planning they would benefit from
- Excellent attention to detail, both verbal and written, to ensure document accuracy
- Able to manage and liaise with multiple Clients 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
- Ability to efficiently manage work load and Client files
- Willing-ness to learn and expand knowledge

Package

- £22'600 - £30'000 with support to progress to a senior Estate Planner
- Up to 20% discretionary bonus
- 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 12.00-8.00 pm
- Complimentary Will and End-of-Life planning
- 30% discount for immediate family Wills and End-of-Life planning
- Critical illness insurance
- Income protection
- Death in service

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 Client's wealth, where possible, goes exactly where they want it to. The Will industry isn't regulated, which means the quality of advice can be low. Every Kinherit adviser qualifies with the Society of Trust & Estate Practitioners (STEP), so we'll always give the best advice available.

Role summary

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

We take your natural talent and support you to attain your Society of Trust and Estate Practitioners (STEP) qualifications before becoming a Kinherit Estate Planner. The development does not stop there. Our Estate Planners are supported with their personal development from STEP Affiliate, to STEP Associate through to full TEP, being promoted throughout the journey.

The day-to-day role of a Kinherit Estate Planner is to guide our Clients 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, Estate Planner your role is to analyse our Client's estates to produce accurate recommendations and documentation plus gain the information to support our full handover service. This, in turn, protects our Clients' money on death, whilst also saving their executors time by removing any undue hassle.

Estate Planners are assigned Introducers (Third Party Professional companies) who pass potential Clients to Kinherit. This is the Account Management aspect of the role. Estate Planners influence the volume and quality of Clients from their Introducers, so it is crucial to build and maintain professional relationships.

As an Estate Planner, you provide an advice-led service, being an expert in all aspects of estate 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 Clients in our revolutionary handover service using our Kinvault.