

Legal Assistant (Legal Secretary)

Kinherit – 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; our qualified estate planners help Clients make sense of a whole range of legal and financial issues. Your role will be calling our Clients, at the start and end of their Estate Planning journey.

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
- Highly confident in speaking to Clients over the telephone and video is critical
- Exceptional use of the English language both written and verbal
- Comfortable with speaking with a diverse range of Clients including high-net-worth individuals
- Ability to follow clear processes and procedures

Desirable

- Experience working in a telephone-based role
- Experience in legal or professional services
- Experience working in an office environment
- Experience providing Clients with outstanding service

Attributes

- Excellent verbal communication skills, and ability to engage with Clients via telephone and video (on occasion)
- Ability to analyse the needs of Clients following a script with the flexibility to suit the situation
- Excellent attention to detail, both verbal and written, to ensure communication accuracy
- Able to manage and liaise with multiple Clients, estate planners 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 £20'200 - £24'200 pro-rata
- Up to 10% discretionary bonus
- 25 days holiday plus 24&31 December and statutory bank holidays
- Pension
- Working hours
 - Either full-time 37.5 hours per week
 - Or part-time but 5 days a week (20 hours plus)
- Complimentary Will and End-of-Life planning
- Up to 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. 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 Clients can be confident that when they die whatever they want to happen will happen – with no assets or information missed and without their families having to pay or do anything extra.

Our principal strategy is to find Clients via professional introducers – in particular, wealth managers and independent financial advisors.

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, and quickly apply that knowledge to support Clients directly.

To be successful in this role your professional and friendly approach is critical, with high-quality outcomes from every interaction.

Your primary role will be calling our Clients, at the start and end of their Estate Planning journey. Firstly, you will call potential Clients who are introduced to us by our extensive professional network, to book them an appointment with our Estate Planning team. This is the first connection with our Clients and rapport-building is critical. At the end of the Client journey, you will contact the Clients again to support them in uploading their completed plans to their own personal Kinvault® plus calling their friends and family to introduce us, and inform them of what should happen, when the time comes.

Role description

As a Kinherit, Legal Assistant your role is to telephone potential Clients that have been introduced to us by their trusted financial advisors. You will initially introduce Kinherit and gain confirmation that the Clients have a need or a want for Estate Planning. You will then, with the use of the Kinherit portal, book the Clients an appointment with their dedicated Estate Planner. Following the call your notes are critical in informing the Estate Planner, ensuring they have all the basic information required for them to conduct the advisor-led call.

After the Estate Planner has completed the Client's plans, your role is to speak with the Clients again, this is to support them with our revolutionary handover service and using our Kinvault[®]. You will explain how to add the documents and details into their own personal Kinvault[®]. Lastly, you will contact the friends and family of our Clients, explaining who we are and how to contact us when the Clients die or become incapacitated.

Career progression is crucial, we support all employees to gain the experience they need for their next step. If you want to gain promotion and become an Estate Planner or one of our Legal Quality controllers the Legal Assistant role will give you the skills and experience you need.