

## Estate Planner / Will writer

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

We're a law firm specialising in Wills, Trusts, Lasting Powers of Attorney and Estate Planning. We combine 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

This role would suit someone who is currently in a legal assistance or secretarial role, who is looking for the next step (you would be responsible for your own client base).

### Required

- Graduate in a regulated profession such as Law or Accountancy and Finance having attained a minimum of a high 2:1, or a diploma in financial services OR relevant experience in Will writing and estate planning.
- Confidence in speaking to clients over the telephone and virtual
- A proven track record in attaining academic, career and personal development
- Attention to detail

### Desirable

- Will Writing and / or Estate Planning experience
- Experience working in a law firm/solicitors firm is advantageous
- Experience providing clients with high levels of service
- Experience with managing own client base
- Society of Trust and Estate Practitioners (STEP) membership / qualifications would be advantageous but not essential
- Having completed the Legal Practice Course or SQE would be advantageous but not essential

### Attributes

- Excellent verbal and written communication skills, and ability to engage with clients on the phone and over Zoom
- Ability to analyse the needs of clients and advise accordingly
- Excellent attention to detail, both verbal and written
- Able to manage and liaise with multiple clients and introducers at different stages of the process
- 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 workload and client files
- Willing-ness to learn and expand knowledge

## Package

- **Funded and supported professional STEP qualifications**
- Salary based on STEP qualifications and experience
  - a. STEP Student from £23810
  - b. STEP Affiliate from £25410
  - c. STEP Associate from £34927
- Up to 20% discretionary bonus
- 25 days holiday plus 24 & 31 December, and statutory bank holidays
- Pension
- Working hours
  - a. Either full-time 37.5 hours per week
  - b. 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 range of legal and financial issues, creating a Will that ensures 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 would suit someone who is currently in a legal assistance or secretarial role, who is looking for the next step (you would be responsible for your own client base) or talented law graduates having attained a high 2:1 or a first-class law degree or perhaps Legal Practice Course/SQE. The ideal person would have ambitions to use their knowledge gained at university or previous employment and quickly apply that knowledge to support clients directly.

We take your natural talent and support you to attain your Society of Trust and Estate Practitioners (STEP) qualifications, but 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 on death. 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.

**If you like the sound of becoming an Estate Planner but don't have the experience or qualifications just yet, the Legal Assistant role will give you the skills and experience you need to progress.**

**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.**