

Legal Assistant (Legal Secretary)

Kinherit – 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 has recently completed studying Law and looking for their first opportunity in the legal profession or is currently in a legal assistance or secretarial role, who is looking for the next step.

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

- 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

- **Funded and supported professional STEP qualifications**
- Salary based on STEP qualifications and experience
 - a. No experience or a STEP Student from £23810
 - b. STEP Affiliate from £25410
- Up to 10% 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 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.

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 Client again, this is to support them with completing their planning and signing all Will documentation plus additional documents produced, such as Legal Powers of Attorney, Trusts, Business Trusts and Deeds of Severance. 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.