**Job Title: Fee Earning Paralegal  
Department: Private Client  
Reports to: Fee Earner**

**Overview of Role**

This role is for an experienced Fee Earning Paralegal with a minimum of three years' experience working in a fee-earning capacity within Wills and Probate law. The successful candidate must have a solid understanding of private client matters and be confident in handling client meetings, running files with supervision, and managing cases through to closure. You will play a crucial role in supporting the Private Client department by progressing matters in the absence of the fee earner and maintaining regular communication with clients and third parties, both over the phone and in person.

**Key Responsibilities**

**(This list is non-exhaustive.)**

**File Management & Client Interaction**

* Conducting client meetings confidently, including discussing matters, answering queries, and providing guidance.
* Handling file management, ensuring matters progress efficiently with regular client updates.
* Assisting with drafting Wills and Lasting Powers of Attorney (LPAs), including engrossing final Wills and registering executed documents.
* Applying for Grants of Probate, including liaising with HMRC where necessary.
* Preparing and issuing accurate quotes to prospective clients.
* Conducting client due diligence, ensuring all compliance checks are processed correctly.
* Managing the onboarding process for new clients, including opening files and gathering necessary documentation.

**Legal Administration & Compliance**

* Preparing relevant probate administration letters and managing estate administration tasks.
* Raising invoices and generating requisition slips for payment processing.
* Maintaining and scanning client documentation into the Case Management System (CMS).
* Ensuring secure and efficient storage of executed Wills.
* Drafting and sending legal correspondence via email, letter, or client portals.
* Covering for the supervising fee earner in their absence and ensuring cases continue to progress smoothly.

**Client & Office Support**

* Confidently handling telephone and in-person queries from clients and third parties.
* Assisting clients with signing documentation and answering any queries during in-person meetings.
* Archiving closed files in accordance with firm policies.
* Ensuring the confidentiality and security of all client and practice documentation.
* Assisting with general administrative tasks such as answering calls and directing inquiries appropriately.

**Training & Development**

* Keeping up to date with relevant fraud prevention, data protection, anti-money laundering, and cybercrime training.
* Proactively seeking to enhance legal knowledge within Wills and Probate law.

**Required Qualifications & Experience**

* A minimum of three years’ experience as a Fee Earning Paralegal within Wills and Probate.
* Strong experience in client-facing roles, with the ability to handle meetings and manage client expectations independently.
* Law degree (preferred) or equivalent legal experience within Private Client matters.

**Key Skills & Attributes**

* Excellent communication skills (written and verbal).
* Strong analytical and problem-solving abilities.
* Confidence in client interactions, both over the phone and in person.
* High level of accuracy and attention to detail.
* Effective time management and ability to prioritise workload.
* Strong IT and numeracy skills.
* Ability to work autonomously while collaborating as part of a team.
* Professional, approachable, and calm under pressure.
* A proactive and positive attitude.

**Firm Expectations & Values**

* Uphold the firm’s reputation by always acting in its best interests.
* Adhere to all firm policies and procedures.
* Demonstrate respect and professionalism towards colleagues, clients, and all external contacts.
* Provide exceptional client care, ensuring a high-quality and empathetic service.