

Job Description

Name	
Job title:	Probate and Wills Adviser
Department	Wills and Probate Team
Line Manager	Wills and Estate Specialist
Line management responsibilities:	None

Aims and purpose of the job

To provide an effective, compliant and client-friendly probate and estates completion service to David Allen clients, thereby adding value to, and supporting, the Wills and Estates Team in their corporate objectives and client services.

To review process and service levels to ensure continual improvement in the way the probate service is delivered.

Generic role duties to include:

1.	To manage all probate work and advise clients throughout the process, ensuring estates are completed in a timely manner, meeting all essential deadlines and keeping the executors updated with progress.
2.	To prepare and submit all necessary probate & estate administration documents.
3.	To attend meetings with and correspond with clients as necessary to help them navigate the probate process and to ensure collation of all necessary information and documentation.
4.	To advise clients on Trust registration responsibilities, collating Trust registration data and registering trusts as required.
5.	To collect and collate personal and financial data from clients in order to provide them with appropriate and best advice relating to their options for wills and estates planning and the implications flowing from it. To appropriately identify the client's needs and expectations in relation to their wills and inheritance planning. To take full and accurate instructions from clients through face-to-face meetings or remote contact.
6.	To draft, prepare and register wills, Lasting Powers of Attorney and other estate planning documentation, of varying degrees of complexity, together with any ancillary documents and correspondence. To prepare these documents according to clients' instructions, in a timely manner, and in full compliance with statutory and regulatory authorities and the standards and criteria required by the Institute of Professional Will Writers. To check, and be responsible for, the accuracy of your work at all times.

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7.	To archive historic probate files in accordance with all statutory requirements and ensure client documents have been returned where appropriate.
8.	To ensure that client data, information and records are secure at all times.
9.	To support the Wills and Estates team with business development including through writing articles and attending networking events and agricultural shows.
10.	To utilise knowledge of trusts and estates to assist in development of this area of work and ensure all work is carried out to the highest standard.
11.	To maintain your knowledge and keep up to date with legislation changes to be able to advise clients on their affairs and ensure all work produced is to the highest standard in accordance with current legislation.
12.	To take full responsibility for all work and tasks assigned to you.
13.	To plan, manage and prioritise your own workflow and productivity to ensure your targets and deadlines are achieved.
14.	To adopt the culture of 'treating customers fairly'.
15.	To develop your own knowledge and understanding of each client that you work with ensuring you meet their expectations and they are well looked after.
16.	To deal with all communications in a timely manner to ensure all are of a high professional standard.
17.	To maintain and update manual and computer records on <i>Virtual Cabinet</i> in a timely and accurate manner.
18.	To ensure that all clients are looked after and receive the highest level of service.

Central duties

19.	To represent the business when required to ensure positive links, relations and networks.
20.	To show a commitment to diversity, equal opportunities and anti-discriminatory practices.
21.	To undertake personal development necessary to ensure effective performance in the role.
22.	To participate in relevant and appropriate training and development as required.
23.	To demonstrate the David Allen values of ambition, professionalism, knowledge, integrity, and respect in the work you do and during your appointment.

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Method of working

The David Allen Group expects all staff to work effectively, both as individuals and as part of a team, delivering high quality services and support to clients and staff. In doing so, the company expects all staff to display all of the core competencies as defined in the performance and development appraisal arrangements and to conduct themselves in a manner which befits their professional status and responsibilities.

Public relations

Considerable importance is attached to the role the business plays in its various communities. It therefore follows that all staff are expected to work to maintain and develop these relationships at every opportunity by positively promoting the work of the business and the role it can play in supporting the aims of its stakeholders.

This job description is a guide to the work the post holder will be required to undertake. In consultation with the post holder, it may be amended from time to time by the line manager to meet changing circumstances or business needs. Specific targets and objectives will be agreed with the post holder and will be reviewed regularly as part of the performance management arrangements.

I acknowledge receipt of the above job description, detailing the duties and responsibilities of this post and confirm my acceptance of them.

Signed:		Date:	
Print name:			