

## Person Specification – Probate and Wills Adviser

Below are some of the skills, knowledge and experience which are required for this post.

	Essential	Desirable
<b>Education / Qualifications</b>		
Five GCSEs at grades A*-C (9-4) including Maths and English, or equivalent.	*	
Vocational qualification e.g. STEP Certificate in Estate Planning & Trusts or equivalent.		*
<b>Skills/ Knowledge/ Experience</b>		
Experience in estate administration with managing a caseload.	*	
Experience in administration of estates over the inheritance tax threshold and completing IHT400 returns.	*	
Experience of completing applications for a grant of representation.	*	
Experience in administration of estates comprising of businesses and farmland.		*
Experience in Will Writing.		*
Some experience within a legal, accounts or professional office.		*
Some specialist technical knowledge relating to the statutory and regulatory compliance requirements around will drafting e.g. the Mental Capacity Act and key case law.		*
Proficiency in general IT skills, particularly in Microsoft Word and Outlook.	*	
Ability to build positive relationships with a passion for outstanding customer service.	*	
Ability to work accurately with high levels of care and attention to detail.	*	
Excellent written and verbal communication skills with all stakeholders.	*	
Ability to manage time and prioritise work effectively with demanding deadlines to deliver against targets.	*	
Ability and confidence to secure new business and develop client relationships.	*	
Ability to quickly assimilate a client's needs in relation to approach and the presentation of technical advice.	*	
<b>Personal Behaviours &amp; Qualities</b>		
Ability to work well in a team, understanding group objectives, and how to contribute to them and add value.	*	
Ability and confidence to work independently and to make decisions appropriately without escalation.	*	
Sense of empathy to be able to support clients through difficult conversations.	*	
High standards of personal work including a strong sense of confidentiality.	*	
Desire to learn and develop professional skills in will writing and estates planning.	*	

# David Allen

Desire to continually develop and learn on an individual, team, and corporate basis.	*	
Professional and confident with the ability to respond to challenges in a calm and professional manner.		*
Ability to demonstrate behaviours and expectations consistent with the David Allen values of ambition, professionalism, knowledge, integrity, and respect.	*	
<b>General</b>		
Ability to travel independently between offices and to undertake client home visits if required		*