

**Job Description**

<b>Name:</b>	
<b>Job Title:</b>	Wills and Probate Assistant
<b>Department</b>	DACA – Wills and Probate
<b>Line Manager:</b>	Wills and Estate Specialist and Team Manager
<b>Line Management Responsibilities:</b>	None

**Aims and purpose of the job**

To work as part of the Wills and Probate team to manage the department's day-to-day administration, helping to deliver excellent client service and maintain departmental and back-office systems.

To develop an understanding of wills and probate systems and processes in order to provide support and cover to the team's fee earners during busy periods or periods of absence.

**Generic role duties to include:**

1.	To manage and undertake routine department administration including incoming and outgoing post and the sorting and filing of all correspondence.
2.	To carry out all administrative tasks to support the team's will writers as and when required, including but not limited to: <ul style="list-style-type: none"> <li>• Managing team diaries and booking appointments with clients.</li> <li>• Preparing information packs ahead of client meetings.</li> <li>• Sending documents to clients including copy wills, draft wills, and power of attorneys, ensuring all documentation is produced to the highest standard and in accordance with relevant legislation.</li> <li>• Liaising with and gathering information from clients who have ongoing matters with the department.</li> <li>• Sending out invoices to clients.</li> </ul>
3.	To maintain and update manual and computer records in Virtual Cabinet in a timely and accurate manner, ensuring that client data, information, and records are processed securely and in line with relevant legislation.
4.	To maintain regular contact with existing clients, undertaking client contact calls annually at a minimum.
5.	To carry out administrative tasks to support the team's Trust and Estate Specialist as and when required. This shall include helping the Trust and Estate Specialist with the completion of probate casework and/or undertaking administrative duties related to the completion of probate casework under instruction and guidance.

6.	To provide support to all of the team's fee earners as and when required. To develop an understanding of wills and probate processes and ongoing matters such that you can provide cover and take client meetings during busy periods or periods of absence when appropriate.
7.	To assist the Wills and Estate Specialist to identify ways to improve and develop the departmental and back-office systems, ensuring streamlined and accurate processing at all times.
8.	To ensure that clients receive the highest level of service at all items by continually developing: <ul style="list-style-type: none"> <li>Your knowledge of the statutory, regulatory and best practice provisions relating to wills and probate administration.</li> <li>Your understanding and knowledge of each client that you work with.</li> </ul>
9.	To carry out any other tasks as required.

### Central duties

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

### 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.