

## Person Specification – Wills and Probate Assistant

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

	Essential	Desirable
<b>Education / Qualifications</b>		
GCSE or equivalent at grades A*-C (9-4) in Maths and English.	*	
A legal qualification such as a law degree or equivalent.		*
<b>Skills/ Knowledge/ Experience</b>		
A minimum of two years experience working in an office environment providing administrative support.	*	
A minimum of six months experience of wills and probate or legal work.		*
Some experience with electronic documents and record filing/retention systems.	*	
Excellent computer skills, ability to use Word/Outlook/Excel to a high standard.	*	
An aptitude generally for technology, confident using IT systems to input and store personal data.	*	
High levels of accuracy and attention to detail with work methods to ensure work is correct.	*	
Excellent written and verbal communication skills.	*	
Excellent customer service and interpersonal skills.	*	
Some experience managing team diaries.		*
<b>Personal Behaviours &amp; Qualities</b>		
High level of confidentiality and integrity.	*	
Enthusiastic to learn and contribute to the business success of a team; a genuine interest in working in Wills and Probate.	*	
Strong sense and understanding of quality in a client facing service.	*	
Strong sense of team, willing to contribute to team objectives and support others to achieve their targets and work commitments.	*	
Ability to plan, manage and prioritise work tasks and review flexibly.	*	
Ability to use own initiative but know when to refer queries and take instructions.	*	
Friendly but professional confident manner; with ability to build positive relationships with clients and colleagues.	*	
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		*