



**Davis Gregory**  
Solicitors & Notaries

25 RODNEY ROAD · CHELTENHAM · GLOUCESTERSHIRE · GL50 1HX

<b>Job title:</b>	<b>Private Client Lawyer</b>
<b>Job Type</b>	<b>Permanent Full time</b>
<b>Team:</b>	<b>Private Client</b>
<b>Department:</b>	<b>Private Client</b>
<b>Location:</b>	<b>Cheltenham</b>
<b>Reports to:</b>	<b>Simon Greener, Director Private Client</b>

#### **Summary of role:**

The job holder will undertake and supervise fee earning work in Private Client providing efficient and effective legal advice, assistance and representation for clients and maintaining the highest standards of professional expertise and client care at all times.

They can expect to build and run a caseload of comprising of wills, LPAs and estate administration on behalf of clients

The job holder will be expected to make every effort to obtain a speedy result for the client, to be accessible to their clients and to maintain regular and appropriate contact with them. They will also be expected to deal effectively and considerately with people from different cultures and backgrounds.

This is an opportunity for an enthusiastic and motivated solicitor/legal executive with ambition to work in our private client department. This role will require undertaking fee earning work, working both independently and as a member of the team, maintaining existing relations with the firm's clients and to assist and help develop new relationships with third party referrers.

Davis Gregory aims to provide a holistic service and fee earners are encouraged to work together with other fee earners, support staff and with employees in other departments to ensure the best quality service.

The job holder will be directly responsible to the Head of the Private Client Department and to the Directors of the firm in general.

The job holder will ensure the successful development of the firm in line with the strategy identified by the Directors.

As a private client lawyer the job holder will be expected to work without the need for supervision.

## Responsibilities:

### Key duties and responsibilities

- To undertake fee earning work, working both independently and as a member of the team and provide a profitable contribution to the work of the department.
- To maintain existing relations with the firm's clients and assist and help develop new relationships with third party referrers.
- Conduct of private client and related matters on behalf of clients.
- Drafting of Wills, Trusts, Lasting Powers of Attorney and dealing with Trust and Estate Administration.
- Deal with correspondence and telephone queries
- Deal with clients requiring advice in person
- Provide written advice to the client, where necessary, and manage the client's expectations
- Maintain proper diary systems
- Deal quickly and efficiently with clients
- Produce own documents and letters
- Negotiate with other parties
- Submit interim and final bills on a regular basis
- Management of support services for which you are responsible, including supervision of support staff.
- Completing time recording and other management records required by the firm.

### Miscellaneous

- Perform fee earning work accurately, reliably and in accordance with the firm's quality and risk management procedures.
- Attend meetings and training sessions, where relevant to the job holder's role, leading by example with contributions made at and subsequent to such events.
- Provide leadership, direction, encouragement and supervision to all staff that they oversee or supervise, whether on an office or departmental basis.
- Participation in marketing activities and active promotion of the company. To be effective in developing new work from existing clients and seek new clients for themselves and others. Will develop and support marketing initiatives.
- Promote Davis Gregory Limited and the work of the Private Client team externally, with the aim of increasing the number of clients of the team and building relationships with external organisations, including referring organisations.
- Gain or maintain IT skills appropriate to modern legal practice, such as ability to use case management software, to send, forward and respond to e-mails with or without attachments, conduct research on internet and ensure proper filing of all data.
- Understand the main uses and applications of the office telephone system – e.g. be able to re-route calls, set up conference calls, etc.
- Complying with Solicitors Accounts Rules and Rules of Professional Conduct of solicitors
- Ensure that cases are conducted in accordance with the regulations of the Law Society and SRA are adhered to.
- Exercising high standards of client care at all times
- Ensuring confidentiality and security of Firm's and client's documentation and information

- Carrying out any other duties relevant to the position as and when required by the Directors of the Company.
- Travel to other Davis Gregory offices and other locations as required in order to carry out casework, marketing and training
- Keep up to date with changes in the law and procedures
- Meet financial targets, as set by the Directors
- Manage own continuing professional development.
- Ensure that they meet the requirements of the Solicitors Regulation Authority or the Chartered Institute of Legal Executives (as appropriate) to maintain their registration with that organisation

### Skills and capabilities

- Ability to work under pressure and meet deadlines
- Ability to work on your own initiative and make decisions
- Ability to work as part of a team and be a positive team member
- Ability to prioritise effectively
- Maintain a smart appearance and dress code appropriate for the role and be punctual and reliable in office attendance
- Responsible for self-development and comply with relevant training requirements by the Law Society and in-house training when required.
- Ability to Communicate effectively both written and spoken, active listening
- Problem Solving
- Ability to learn
- Ability to develop relationships
- Computer Literate
- Understanding of the company's business and the marketplace
- Role model best practices
- To have at least 2 years' experience in Private Client as a fee earner
- To be qualified as a Solicitor or a Chartered Legal Executive.

### Performance

Personal performance in the role is measured by achieving, maintaining and exceeding the expected level of:

- financial targets
- demonstrating the skills and capabilities for the role
- identifying under performance highlights areas for individual development in order to ensure effective delivery of service to the client.



**PERSON SPECIFICATION**

**JOB TITLE:** Private Client Solicitor/Legal Executive (2/5 years PQE)

**DEPARTMENT:** Private Client

**REPORTS TO:** Head of Private Client

**KNOWLEDGE, SKILLS AND QUALIFICATIONS REQUIRED KNOWLEDGE, SKILLS & EXPERIENCE:**

Essential Criteria

- 2/5 years PQE
- Strong organisational skills with the ability to manage deadlines and competing priorities.
- Good “hands on” private client experience in Wills, Trusts, Lasting Power of Attorney and Trust and Estate Administration.
- Excellent client facing skills and the ability to nurture existing clients and third-party relationships as well as the ability to help develop new business and assist in networking events.
- The ability to prioritise work and to work to strict timescales where required.
- Technical proficiency and good IT skills
- Good academic background

Desirable Criteria

- STEP qualified
- SFE accredited
- Previous use of case management systems.
- Full clean driving licence as travel to see clients will be required.