



Job Description:

Associate

Reporting to: Head of Team

Location: Brentwood

Special requirements: This role is subject to blended working with an expectation of 3 days in the office, based on a full time working pattern and would be pro rated accordingly for a part time working pattern. Some travel is expected across Tees offices. Access to a vehicle is required. Flexibility of working hours will be required to meet client needs.

Main Purpose of the role:

Provide a quality, tailored and supportive legal service to a range of clients.

Proactively manage a portfolio of clients and anticipate their specific needs in Wills, Trusts Tax and Probate.

Mentoring and supporting junior members of the team with their caseloads. Supporting the head of department and partners with their client work.

Main Responsibilities

Generic

Responsible for managing a complex caseload of client matters with limited supervision.

Providing clients with high quality legal advice, proactively manages client relationships.

Achieving the firm's fee targets and assisting and enabling others in the team to do so by mentoring and developing junior members of the team.

Managing own time effectively to achieve targets. Ensuring cash flow and credit-management systems are managed effectively, such as time recording, lock-up, cash flow, profitability and billing.

Delivering legal services in a manner which is cost-efficient for both the client and the firm. Using technology to enhance performance.

Delegating casework to the most appropriate person in the team to maximize the teams overall contribution and performance.

Providing regular updates to head of team on key performance indicators. Using technology to enhance and improve the team's performance. Assisting in the implementation of new systems and processes.

Identifying opportunities to add value to clients and improve profitability by anticipating client needs and understanding client requirements. Offering cross referrals and other services, being available and accessible out of hours and going that extra mile to provide excellent client service.

Making a significant contribution to the firm's reputation and position within the community by virtue of their reputation for excellence. Attracting new clients and introducers.

Initiating and taking ownership of marketing initiatives for example presenting at marketing events, networking, seminars and contributing to publications.

Undertaking additional technical qualifications relevant to and likely to enhance the legal advice provided, for example, STEP qualification.

Private Client Services

Specifically in the area of private client services, advice and support might include:

- Drafting wills including wills for complex family situations and including trusts.
- Preparing Lasting Powers of Attorney and advising generally on client issues including Deputyships and other Court of Protection applications. Being sympathetic to the particular needs of elderly clients.
- Advising client on Inheritance Tax Planning including Inheritance Tax exemptions and reliefs.
- Preparing and administering trusts including Deeds of Retirement and Appointment of Trustees, documents altering the terms of the trusts.
- Advising clients on the wider implications of any transactions or advice.
- Dealing with the administration of estates including intestacy, high value estates including estates where lifetime gifts have been made, Business Property Relief and/or Agricultural Property Relief have been claimed.
- Managing highly sensitive and emotive cases.
- Contributing to the firm's knowledge bank.

Keeping up to date with developments in private client law, disseminates developments to team members and initiates opportunities for self-development.

Undertaking any other reasonable duties from time to time allocated to the role.

Person Specification

Behavioural and Technical	Essential/Desirable	Definition
Relevant or equivalent legal role	Essential	<p>Is passionate and enthusiastic about their area of specialism.</p> <p>Delivers high quality legal services on own initiative.</p> <p>Proven track record in delivering successful outcomes in relation to complex private client work.</p> <p>Evidence of a wide range of experience and knowledge to meet the requirements of the role.</p> <p>Holds a Law degree, has completed the LPC and a 2 year training contract or holds a qualifying degree, has completed the GDL 1 year conversion course, the LPC and a two year training contract, or holds the relevant CILEX qualification.</p>
Customer service and community focus	Essential	<p>Handles clients appropriately according to their needs. Manages client expectations. Innovative, positive and client-focused attitude.</p> <p>Identifying opportunities to add value to the client experience.</p> <p>Makes a significant contribution to the firm's reputation and position within the local community.</p>
Standards	Essential	<p>Sets and strives for high standards throughout their work.</p> <p>Demonstrates integrity, shares knowledge, supports and promotes colleagues.</p> <p>Maintains continued professional development.</p>
Planning and Organising	Essential	<p>Manages own time effectively, is organised and prioritises work efficiently.</p> <p>Adheres to the firm's procedures for file management and reporting. Monitors and maintains quality and productivity of work.</p> <p>Works effectively and efficiently without supervision. Works independently, as a member of a designated team and as part of the firm.</p>
Equality and Diversity	Essential	<p>Is aware of client needs. Respects others cultural viewpoints and perspectives, is constructive and understanding. Demonstrates empathy and is respectful.</p>

Behavioural and Technical	Essential/Desirable	Definition
		Demonstrates an awareness of pertinent cultural issues both within the firm and the wider environment.
Working with others	Essential	Establishes positive professional and effective relationships. Delegates appropriately and effectively. Experience of negotiating, facilitating and influencing others to achieve desired outcomes. Acting calmly in a crisis, tactful, determined, quick-thinking, but methodical and consistent.
Commercial awareness	Essential	Can demonstrate strong commercial awareness and acumen. Making improvements to operating systems and processes. Attains challenging financial targets and assists others to maximise profitability.
Leading and supervising	Essential	Ability to inspire and motivate a team. Mentoring and supporting others. Commands respect and trust.
Technology	Essential	Computer and web literate and other new media, strong ICT skills. Uses technology and other resources available to achieve objectives.
Presenting and communicating information	Essential	Communicates effectively and appropriately to a range of audiences. Strong oral, written and presentation skills.
Innovation	Essential	Seeks out solutions to a range of problems and issues. Identifies opportunities and new initiatives to support business development. Uses initiative to seek out suitable technical solutions. Handles problems in an innovative way.
Research	Essential	Demonstrates excellent problem solving and a methodical attention to detail skills. Demonstrates excellent research skills.
Business Development and Marketing	Desirable/ Essential	Is able to undertake (or relishes) marketing opportunities including networking, writing articles, and giving presentations.