

Job Description

NAME: //

JOB TITLE: Legal Case Worker

DIVISION: Private Client

OFFICE: //

RESPONSIBLE TO: //

PURPOSE OF ROLE

To assist with the administration of Property and Affairs Deputyship matters and Attorneyship matters, where mfg Partners and staff are appointed as Deputy or Attorney to clients. In addition, to assist on matters where a lay Deputy or Attorney is appointed. To ensure that tasks are undertaken in a timely and effective manner, striving for continuous professional development at work.

PRINCIPAL DUTIES AND RESPONSIBILITIES

Tasks and Activities:

1. To undertake routine case management, including welfare benefits claims, processing and payment of invoices, administration of bank accounts and Excel ledgers.
2. To assist with Applications to Court of Protection for a Deputy to be appointed.
3. To liaise directly (by telephone, correspondence or in person) with clients and other professionals to progress client matters.
4. To undertake client home visits and occasional house searches, where properties are unoccupied in connection with Deputyship, Attorneyship or Probate Administration.
5. To undertake administration of estates.
6. To assist with creation of Lasting Powers of Attorney and registration of the same with Office of Public Guardian.
7. To undertake other duties commensurate with the role as required from time to time.

Generic Responsibilities and Expected Standards:

1. To assist with the implementation of good working practices, maintain a high standard of work and client service/care within your area of responsibility, in accordance with the firm's policies, procedures and guidelines and/or as directed by your line manager.
2. To use initiative on all matters.
3. To ensure confidentiality and security for all firm and client documentation and information.
4. To undertake any specific training course as and when required.
5. To effectively demonstrate the firm's values and behaviours at all times.

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6. To maintain clear and precise communications with other members of staff and assist other members of staff when required.
7. To develop good working relationships with external institutions, organisations and other third parties.
8. To ensure that any equipment supplied for the purpose of your work is used correctly, maintained and any defects/faults are reported.
9. To ensure that Health & Safety principles and safe working practices are followed at all times. Employees have a legal duty that gives them responsibility, so far as is reasonably practicable, to ensure that they do not endanger themselves or anyone else by their acts or omissions.
10. To cooperate with the firm on Health & Safety matters and do not interfere with or misuse anything provided for health, safety and welfare purposes.
11. To keep areas of work clean and tidy.
12. All employees have a responsibility to carry out their work with due regard for the environment. The firm's Environmental Policy and procedures relevant to your area must be followed.

PERSON SPECIFICATION

Skills, Knowledge, Experience and Attitudes

1. A proficient level of literacy and numeracy.
2. Experience of working within a team environment.
3. Experience of data entry and/or text processing.
4. Confident in the use of Microsoft Office software packages including Word, Excel and Outlook.
5. A high level of attention to detail.
6. Ability to interact effectively with others, both face to face and over the telephone, including an excellent telephone manner.
7. A commitment to excellent client service.
8. Good interpersonal skills and an ability to deal sensitively and patiently with potentially vulnerable or assertive clients.
9. Knowledge of DWP benefits for disabled persons.
10. Knowledge of Court of Protection and Office of the Public Guardian Procedures and Practices.
11. Focused on achieving goals, adopting a proactive can do attitude.
12. Uses initiative, works creatively and solves problems.
13. Highly motivated and willing to learn.
14. An understanding of and adherence to General Data Protection Regulation (GDPR), and maintaining confidentiality and integrity at all times.

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SUMMARY

The details outlined in this job description reflect the content of the post at the date the job description was prepared. It is inevitable that over time the nature of a defined job role will change, existing duties may be lost and other duties gained without changing the general character of the work or level of responsibility entailed. It is intended that this job description will be revised from time to time in discussion with the post holder.

In addition, you may be expected to perform other duties commensurate with this position or as required to assist the business needs. Any additional tasks will be kept within your abilities and skills range, and training will be provided if necessary. Such agreement should not be unreasonably withheld.

Name:

Signature:

Date:/...../.....