

Job Description

NAME: //

JOB TITLE: Senior Associate

DIVISION: Private Client

OFFICE: Kidderminster

RESPONSIBLE FOR: //

RESPONSIBLE TO: Divisional Head

PURPOSE OF ROLE

To uphold the highest standards of client care, in line with the firm's values, through consistently adopting and encouraging best practice in the areas of client care, regulatory and best practice, professional development and financial hygiene. To support events which promote the mfg brand as a firm of choice, whilst contributing to Divisional development. To ensure that tasks are undertaken in a timely and effective manner. To strive for continuous professional development at work.

PRINCIPAL DUTIES AND RESPONSIBILITIES

Tasks and Activities:

Client Service

1. To handle and resolve a range of private client matters of increasing complexity commensurate to the role (including wills, LPAs, administration of estates and tax planning), aiming to do so within a reasonable timeframe.
2. To ensure that clients are regularly updated as to the current situation of their case, even if this is going through a period of inactivity.
3. To deal with telephone calls, emails, letters, and other electronic or on-line enquiries effectively and efficiently.
4. To ensure good working relationships with external institutions and organisations.
5. To demonstrate effective relationship management with peers and with colleagues.

Regulatory & Best Practice

6. To adhere to and implement Law Society and firm guidelines and regulations including inter alia those on client care, time recording, billing, disbursements, collection of bills, confidentiality and client and office accounts.
7. To undertake file reviews and provide constructive feedback as a means of quality control.
8. To ensure the confidentiality and security of all firm and client documentation/data in line with GDPR standards.
9. To ensure that all complaints are dealt with professionally, promptly and in accordance with firm policies.
10. To complete all appropriate documents, maintaining files in a neat and orderly state and reviewing matters regularly, in accordance with firm policies/procedures.

Job Description

11. To understand the obligations relating to client accounts and ensure bills, payments and receipts comply with the Solicitors Accounts Rules and the firm's rules.
12. To be able to identify risk and to communicate and take steps to mitigate.
13. To understand and demonstrate compliance with the firm's Client Service Charter.

Professional Development

14. To assist the Divisional and where appropriate, the Deputy Divisional Head, on such matters as technical and professional updates.
15. To maintain respectful and effective communications with other members of staff.
16. To share information and knowledge freely and demonstrate effective delegation and support for others within mfg.
17. To carry out such other relevant duties on behalf of the Division as allocated by the Partners.

Financial

18. To attain individual financial performance targets.
19. To maintain best practice for debt recovery and promoting this across the Division.
20. To actively contribute to the financial success of the Division and the firm by attainment of set financial objectives to include Divisional financial targets.

Marketing and Business Development

21. To assist in marketing and business development activities, taking active steps to make existing clients and contacts aware of the types of legal work undertaken by the firm.
22. To consider and effect introductions to other Divisions of mfg where possible.
23. To contribute to the delivery of the firm's strategic aims.

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.
6. To maintain clear and precise communications with other members of staff.
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.

Job Description

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.

PERSON SPECIFICATION

Skills, Knowledge, Experience and Attitudes

1. Technical and practical understanding of appropriate law and context.
2. Commercial awareness and understanding of the firm's constraints.
3. Demonstrable commitment to outstanding client service.
4. Adept in communicating professionally with others, both orally and in writing including an excellent telephone manner.
5. Proficient at managing multiple deadlines.
6. An effective team player and ambassador of the firm's Values and Behaviours.
7. Passionate about continuous professional development and supporting the growth of the Division and the wider firm.
8. Competent with all forms of information and communications technology.
9. A high level of attention to detail.
10. Uses initiative, works creatively and solves problems.
11. Proactive with a can do attitude.
12. Highly motivated, driven and enthusiastic to achieve goals.
13. An understanding of and adherence to General Data Protection Regulation (GDPR), and maintaining confidentiality and integrity at all times.

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.