JOB OPPORTUNITY

Paralegal – Private Client Team

Bedale Office

ECCLES HEDDON SOLICITORS

Job Title:

Paralegal – Private Client Team

Responsible to:

Head of Department – Private Client Team

Main purposes of role:

This is a role suitable for a person with some legal knowledge, whether that has been gained through a Degree, SQE or LPC level qualification or in legal practice. It is a role which forms a basis of a legal career with potential to be counted as part of qualifying work experience towards a Solicitor's qualification, or as part of a CILEX apprenticeship.

Skills & Experience

Essential

- Previous experience in a legal or administrative role (Private Client experience desirable) OR a law degree level qualification.
- Strong communication skills, both written and verbal.
- Excellent organisational skills and attention to detail.
- Ability to handle sensitive matters with discretion and empathy.
- Confident telephone manner and client-facing skills.
- Ability to prioritise and manage a varied workload.

Desirable

- Experience in Wills, LPAs, or probate work.
- Familiarity with case management systems.
- Understanding of Private Client processes and terminology.

Personal Attributes

- Professional, approachable, and client-focused.
- Proactive and able to work both independently and as part of a team.
- Willingness to learn and develop within the Private Client discipline.
- High level of integrity and confidentiality.

Career Development

This role provides an excellent opportunity to develop a career within Private Client law, with ongoing training and the potential for progression to a fee-earning role.

Main purposes of role:

- Support fee earners and partners across a broad range of private client matters, including wills, probate, powers of attorney, trusts and estate administration.
- Act as the first point of contact for all calls to the Private Client Team in the office in which you are located; assess new client enquiries and ensure that first appointments are booked with the correct level of fee earner in the team, across offices if necessary; including cover for paralegal colleagues with the same role in other offices when they are absent.
- Undertake fee earning work in relation to Wills, Lasting Powers of Attorney and non-taxable Probate matters and provide a profitable contribution to the work of the department and the firm.
- Deliver an excellent standard of client care.
- Contribute to the successful development of the department and of the firm in line with any business plan.

Client Intake & Call Handling

- Act as the first point of contact for all incoming departmental enquiries (telephone, email and online) in the office in which you are based (and for other offices when providing holiday cover)
- Conduct initial fact-finding with prospective clients in a professional and empathetic manner.
- Assess the nature and complexity of enquiries and allocate appropriately to relevant fee earners.
- Make initial appointments for fee earners and provide them with an Enquiry Information Form in support.
- Maintain accurate records of enquiries and follow up where required.
- Provide clear, basic information about services, processes, and likely next steps (within competence and compliance limits).

Wills & Estate Planning

- Prepare simple and mirror Wills under supervision.
- Take client instructions and draft basic documentation for approval by supervising fee earners.
- Arrange execution of Wills and ensure compliance with formalities.
- Maintain accurate file notes and case records.

Lasting Powers of Attorney (LPAs)

- Prepare and process applications for Property & Financial Affairs and Health & Welfare LPAs.
- Liaise with clients, attorneys, and certificate providers as needed.
- Submit LPA applications to the Office of the Public Guardian (OPG).
- Monitor application progress and update clients regularly.

Probate Matters (Non-Taxable Estates)

- Undertake administration of straightforward, non-taxable estates.
- Prepare probate application documents and supporting paperwork (under supervision).
- Enter details onto the Probate Plus software and draft estate accounts (basic).
- Liaise with executors, beneficiaries, financial institutions, and third parties.
- Ensure timely progression of matters with appropriate supervision.

Deputyships / Court of Protection Matters

- Provide administrative support to running a Deputyship/CoP matter under the supervision of a fee earner

General Support

- Open and maintain client files in accordance with firm procedures and compliance requirements.
- Ensure all work complies with SRA regulations and firm policies.
- Maintain confidentiality and data protection standards at all times.

Support to Fee Earners

- Provide general assistance to fee earners across the Private Client team to support efficient case progression.
- Undertake delegated tasks on a range of matters, ensuring work is completed accurately and within required timeframes.

Examples of tasks may include:

- Drafting routine correspondence and legal documents for review.
- Drafting Client Care documentation and ensuring onboarding of clients
- Preparing attendance notes following client meetings or telephone calls.
- Conducting basic legal and factual research (e.g. asset tracing, procedural requirements).
- Completing and submitting forms (e.g. probate applications, OPG documents).
- Liaising with third parties such as banks, HMCTS, the Office of the Public Guardian, and other professionals.
- Chasing outstanding information or documentation from clients or organisations.
- Entering data onto Probate Plus
- Assisting in the preparation of estate accounts and schedules of assets/liabilities.
- Trust registration and Trust spreadsheet maintenance
- Organising and maintaining file documentation, both electronically and in hard copy.
- Managing diaries, arranging appointments, and coordinating meetings where required.
- Supporting file progression, including ensuring key dates and deadlines are met.
- Assisting with billing preparation and file closure tasks.

Any other tasks as reasonably delegated by the qualified staff in the department, the Head of Department, the Partners, the Practice Manager or within the practice including providing cover for colleagues as and when necessary.

This job description is intended to provide an outline of the main duties and responsibilities of the role. It is not exhaustive and may be amended from time to time to reflect the needs of the department and the firm. The postholder will be expected to work in accordance with the firm's policies, procedures and professional obligations, and to support a positive, inclusive and collaborative working environment.