

# Barcan+Kirby

## Job description

Barcan+Kirby

**Job Title:** Probate Legal Assistant  
**Reporting to:** HOD, Private Client  
**Responsible for:** N/A

**Department:** Private Client  
**Date:** October 2016  
**Location:** Kingswood & Thornbury

### Job Summary

To provide direct support to the private client department to enable each of them to operate at optimum efficiency.

### Key responsibilities

- + Typing, using SOS Connect, Isokon Probate software and digital dictation to manage all current and archived matters, including managing existing contacts and client data and creating new contacts, clients and matters as required
- + Setting up probate files
- + Using and entering information on Probate software package
- + Preparing letters to obtain information for probate
- + Arranging valuations
- + Collecting in assets and paying liabilities
- + Liaising with clients, other solicitors, the courts, utility companies, banks, DWP and others
- + Chasing information where necessary
- + Organising meetings and conferences with clients and others; making travel arrangements and arranging refreshments when necessary
- + Preparing basic forms, to include forms required for application for probate, administration of the estate and Lasting Powers of Attorney using SOS and Laserform software
- + Taking telephone messages, scanning and filing post, attaching letters to envelopes with relevant enclosures and ensuring that post is checked and sent
- + Adding dates and deadlines to diaries
- + Researching of information when required
- + Requesting documents from archives and on closing files archiving original documents
- + Maintenance of file format and content in accordance with the Office Manual, photocopying and scanning documents as required
- + Meeting with clients to complete basic forms or obtain further information and instructions. Witnessing Wills and accompanying clients to other solicitor's offices to swear oaths
- + Assisting with reception duties when required
- + Checking incoming post in absence of FE to see what is to be actioned. Ensuring that full notes are on files/ SOS and FE notified by email of all work done on the files in FE's absence
- + Recording billable time when appropriate to do so
- + Assisting with work for other colleagues if they are out of office

### Accounts procedures

- + Preparing private client bills
- + Requesting cheques
- + Obtaining partner's signature on cheques
- + Requesting transfer of money between client and office accounts
- + Referring amendments to cheques and bills to partners for approval and dealing with the formalities for such amendment
- + Any other reasonable duties as directed by your manager

**Signed by job holder**

(Print Name)

Signed:

Date:

