

Portcullis Legals – Job description: Client Advisor

Role: Client Advisor

Salary Scale: £24,000 to £28,000 per annum + Plus Bonus

Hours: 39 hours per week

Work base: Portcullis Legals Ltd based at Portcullis Law Store, 246 Dean Cross Road, Plymstock, Plymouth, PL9 7AZ (*Due to the ongoing pandemic some flexibility around location of work may be required, such as home working*)

Overview:

As Portcullis Legals embarks on a journey of growth and digital innovation, we are now looking to add to the team, an additional Client Advisor. Suitable candidates will have previous legal advice and administration experience in the areas of **Wills, Power of Attorney, Trusts, Estate Administration, Estate Planning.**

We require excellent attention to detail, a high level of computer literacy, good customer service skills and the ability to work well as part of a team.

Context of the Role:

The client advisor will provide legal advice and assistance to clients primarily in all areas of private client work including Wills, Lasting Powers of Attorney and providing support to the Legal Team for Probate Administration.

You will be managing a client case load, working towards targets, by delivering advice face to face, home visits and via digital platforms.

Reporting to: Chief Operating Officer

Main Duties and Responsibilities

Advice:

- Managing own caseload consisting Wills, Trusts and Powers of Attorney work
- To service clients with a view of providing them with appropriate Will and Estate Planning advice
- To ensure that all instructions are compliant with current legal expectations
- To visit existing clients and to deal expediently with queries in a professional manner and in a way that always supports the clients best interests as well as those of the firm
- To always deliver excellent customer service in line with Portcullis Legals' **commitment to excellence**
- To adhere to all Service Level Agreements (SLA's)

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Sales:

- To market the company's products and services in a manner that satisfies clients identified needs
- To contribute to the sales target through the achievement of personal targets set as agreed by the Chief Operating Officer
- Providing quotes to potential clients for all of Portcullis Legal services including the after sales package of Storage (Infinity)
- To ensure best practice Key Performance Indicators (KPIs) are achieved
- To obtain recommendation of business from new and existing clients
- To service clients with a view to reviewing and recommending areas of shortfall around their Estate Planning provisions

Administration:

- To use the company's digital systems including Office 365 and LEAP, in line with training provided
- Carrying out administrative duties for Estate Administration work to assist the legal team
- Setting up new cases and acting as the first point of contact for new clients
- Manage professional relationships with Introducers and professional bodies, such as, but not limited to, the Institute of Professional Will Writers
- Adhere to the Company's Data Protection policy in line with the General Data Protection Regulation (GDPR) 2018 and/or any other applicable legislation.

Additional duties and personal development:

- Coaching and mentoring both existing and new legal advisors (where appropriate)
- Preparing relevant reports and input into team meetings consisting of weekly briefings and quarterly planning sessions
- Network and building relationships – always being an ambassador of Portcullis Legals
- To ensure that your personal learning and development plan is appropriately and adequately completed and kept up to date
- To attend training/management meetings as reasonable expected
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues
- Carry out any other tasks that may be within the scope of the post to ensure the

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effective delivery and development of the firm

- Demonstrate commitment to the overall culture and ethos of Portcullis Legals

Person Specification

1. A law degree or STEP Qualification accompanied with solid legal experience and competency in the area of private client law (particularly Wills, Trusts and Powers of Attorney work)
2. Good interpersonal skills and be able to build rapport quickly with both clients and stakeholders
3. Excellent communication skills both verbal and non-verbal
4. Competent IT skills and experience of Microsoft packages (including Word, Excel and Powerpoint) and ability to learn new software relevant to the firm
5. A passion for delivering the highest level of customer service at all times
6. High energy and drive to support the team in achieving daily targets and in turn, monthly/yearly targets
7. Exceptional organisational skills
8. Flexible approach and willingness to work as part of a team

Benefits:

- 4 day working week (on completion of probation period)
- 25 days annual leave (pro rata), bank holidays (pro rata), and an additional 2.5 days to be taken between Christmas & New Year (pro rata)
- 3% contributions to employer's pension scheme
- NHS top up healthcare plan (including Employee Assistance Programme)

Deadline for applications: 9:00am on Monday 4th January 2020

Interview date: W/C 11th January 2020

(With social distancing rules in place interviews may take place via video call)

To apply: Please send your CV and covering letter addressing the each point in the person specification and send to suzi@portcullislegals.co.uk