

Job description

Job Title: Private Client Solicitor

Reporting to: Partner / Head of Department

Qualifications:

Qualified Solicitor

The role

- To undertake fee earning work
- To make a positive contribution to the work of the Department and to the firm

Key responsibilities

The fee earner is responsible to the Partner of the Private Client Department, and to the firm as a whole, for the effective and efficient conduct of cases on behalf of clients in accordance with the overall policies and objectives of the firm. The fee earner is also responsible for pro-active development and promotion of the firm's high standards and reputation.

All the firm's qualified fee earners are specialists and although they may have some opportunity to work outside their field of specialism, it is anticipated that the specialist area will account for the majority of their fee earning work.

For fee earning and case management purposes, the fee earner is responsible to the Partner of the Private Client Department. For other purposes, e.g. in relation to issues relating to equipment or accommodation the fee earner may be responsible to the Partner with the responsibility for that specific issue.

The post primarily involves the following:-

- Dealing effectively and efficiently with enquiries from prospective new clients.
- Taking instructions from clients, advising and maintaining high levels of client care throughout the course of the case.
- Accepting instructions from new clients and advising them on costs and funding and the firm's terms of business and confirming that advice in writing in accordance with practice requirements of the Solicitors Regulation Authority.
- Obtain payments on account of costs at all relevant stages and keep client advised of costs throughout the course of the case. Delivery of regular bills to the client.
- Preparation and delivery of bills.
- Maintain effective and professional contact with all other parties involved in the case and maintain all necessary correspondence.
- Undertake all necessary preparation of the case or matter.
- Maintain a full and orderly file with comprehensive attendance notes of all meetings, attendances and telephone calls.
- Use fully and record all chargeable and non-chargeable time on the firm's time recording system.
- At conclusion of any case, provide all relevant advice to the client and deal with the proper file closing arrangements and storage.
- Comply with Solicitors Regulation Authority's standards of professional conduct and ethics and, in particular, with the strict requirement of confidentiality of client's affairs, at all times.

- Maintain such financial records and financial information as may be required by the Solicitors Regulation Authority or the firm, including providing calculations of work in progress from time to time;
- Adhere so far as possible to annual billing and performance targets (which would be calculated after consultation with the fee earner) and with performance measures.
- Become familiar with and observe the internal requirements of the firm for file opening and closure, accounting procedures, and maintenance of all necessary records and other administrative requirements.
- Work effectively and efficiently with the non fee earning staff including the Department and firm's Personal Assistants.
- Become familiar with and make the most effective use of the firm's equipment.
- Attend meetings within the Department or the firm to review case work or for the purposes of supervision.
- Attend training internally and externally as agreed with the Head of the Department and maintain a record of all training undertaken and CPD points.
- To complete and maintain as necessary any professional documentation or records (such as a Practising Certificate) as the Solicitors Regulation Authority or any other professional body may require.
- In privately funded cases obtain payments on account of costs at all relevant stages and keep client advised of costs throughout the course of the case. Delivery of regular bills to the client.
- Practice development responsibilities for the department and your own practise, including contributing to the department's overall practice development strategy and its implementation during the year.
- Liaison within the firm with other fee earners engaged in similar and / or related cases matters or clients with a view both to maximising efficiency and avoiding conflicts of interest;

Person specification

You must have a good understanding of the law and practice as well as an understanding of the obligations, including ethical obligations of working as a solicitor.

Essential:

- Qualified Solicitor;
- Experience in private client matters;
- Excellent negotiating experience and skills;
- Excellent oral and written communication skills;
- Some experience of promotion of solicitor's work;
- Efficient and cost effective work practices;
- Knowledge and use of time recording systems and IT;
- Thorough understanding of the obligations, including ethical obligations, of working as a solicitor.

I have read and understand the contents of this job description

Employee name:

Employee signature:

Date of signature:
