**Job Description**

**Job Title:** Legal Advisor – Wills & Probate

**Location:** Sheffield

**Reports to:** Head of Legal Practice or Team Leader for day-to-day matters

**Standard Hours of Work:** 35 hours per week over 6 week shift rotation. This is

 to include shift work between the hours of 8am and 8pm Monday to Friday

**Salary Range (incl. benefits):** £18,200

**Date revised:** 15th May 2017

# Job Purpose

To communicate with clients via various methods but primarily by the telephone in order to take their instructions in connection with drafting a Will under the free Will service.

### SCOPE OF THE ROLE

This role will be based in Sheffield ultimately reporting directly to the Helpline Supervisor.

# PRINCIPAL ACCOUNTABILITIES/TASKS

* To provide preliminary advice on Wills and Probate matters and take initial instructions from clients.
* To provide certain general wills and probate advice based on the experience and capability of the post-holder.
* To contact clients over the telephone primarily and in writing/by email.
* To manage a caseload of simple wills files.
* To draft wills in accordance with client instructions under the free simple will service.
* To assist the Complex Wills team as and where necessary based on the experience and capability of the post holder.
* To contact third parties by telephone to instigate initial investigations.
* To input the necessary data onto system.
* To maintain and keep updated the case management system
* To provide excellent customer care in line with required SLAs and audits.
* To answer all inbound calls and make all outbound calls in a prompt and professional manner to agreed departmental standards.
* To meet strict deadlines
* To perform general administration tasks
* To undertake any tasks which may be required to ensure the smooth running of the department
* To adhere to SRA and Data Protection regulations
* To perform any other duties as and when required.