



JOB DESCRIPTION

# Legal Secretary



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# Legal Secretary

<b>Position</b>	Legal Secretary
<b>Department</b>	Probate
<b>Reporting to</b>	Head of Probate
<b>Office</b>	Bishop's Stortford

### Overall Purpose

To provide secretarial and admin support to the Fee-earners in a professional and effective manner within the Wills and Probate Team.

### Main Tasks

- » To provide general secretarial and administrative support to the fee-earners
- » To ensure the confidentiality and security of all clients documentation
- » To carry out the departmental client care policy by demonstrating a willingness and capability to assist the fee earners in the team to ensure clients problems are solved efficiently and effectively
- » The basic drafting and preparation of correspondence and legal documents, including Wills, Deeds, Lasting Powers to Attorney, COP and IHT forms, completing closure forms for investments under the supervision of the relevant fee earners.
- » Audio typing from digital dictation to include checking that all correspondence and documents are correct and in the in-house style prior to sending.
- » Responding to clients in person and/or by telephone in a professional way to include being able to respond appropriately on the current state of any file.
- » To accurately take and record any messages and pass them on to the appropriate person in a timely manner.
- » To deal effectively with the filing, storage, and retrieval of client files
- » Diary management - to make appointments, arrange meetings and maintain a diary to be checked against the fee earner on a daily basis.
- » Photocopying and scanning
- » File and case management, bill preparation, closing and archiving of files
- » Ensuring all new business opportunities are processed in an efficient manner

- » Building and maintaining knowledge of clients and their matters, and the work in general
- » To contribute to the departmental meetings with ideas and suggestions to improve working practices
- » To undertake any other duties which from time to time may be allocated

**This job description is not a definitive list or exhaustive list of responsibilities but identifies the key responsibilities.**

## Job Specification

	Essential	Desirable
Education Qualifications	Good all round education including GCSE in English and Maths (or equivalent)	Legal secretarial qualification
Experience	Audio secretarial experience Has used Microsoft Office Word and Excel	Legal secretarial experience in Wills and Probate Has used Digital Dictation Probate Plus
Personal Attributes	Well organised Can use own initiative Can prioritise own workload	
Competencies	Excellent IT skills with adaptability to learn new systems Be adaptable to new working practices Good communication both verbally and written Works well in a team	
Other Factors	Can work to deadlines Works well under pressure Good attendance record	

May 2025