



JOB DESCRIPTION

New Client Administrator



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Position	New Client Administrator
Department	Risk & Compliance
Reporting to	Head of Risk & Compliance
Office	Bishop's Stortford

Overall Purpose

To ensure that all client records and matter files are opened in accordance with the Firm's policy.

Main Tasks

- » Dealing with the opening of all new client and matter files for each team ensuring that the correct procedures are followed
- » Carrying out client due diligence and identity verification checks
- » Creating and maintaining accurate records on the firm's practice management system
- » Liaising with relevant staff internally to ensure that the process is completed promptly for clients
- » Guiding clients through the onboarding process, explaining what they need to provide and assisting with any queries as appropriate

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

Job Specification

	Essential	Desirable
Education Qualifications	GCSE English and Maths Level 4 or above (or equivalent)	
Experience	Data entry experience	In a legal environment
Personal Attributes	Excellent client care skills Well organised To have good time management skills Can use own initiative Can prioritise own workload	
Competencies	Good communicator both oral and written Works well with others Knowledge of practice management systems and excellent IT skills Accuracy	
Other Factors	Can work to deadlines Works well under pressure	

September 2025