



# Legal Secretary Apprentice

# Job Description



Job Title	Legal Secretary Apprentice
Team Leader	Head of Probate
Team:	Probate

## JOB PURPOSE

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

## DUTIES AND RESPONSIBILITIES

Administration	<ul style="list-style-type: none"><li>» To deal with support/admin work as directed by the team</li><li>» To prepare letters and documents as given in dictation or on paper, checking that they are correct and in the house style prior to signing or being sent.</li><li>» To be able to deal effectively with the filing, storage, retrieval and closure of clients' files.</li><li>» Allocating scanned post to the correct matters on the firm's case management system.</li><li>» Ensure that all new joiners are included in any relevant ongoing meetings and internal groups</li></ul>
Client	<ul style="list-style-type: none"><li>» To attend to clients and other professionals in a professional way on the telephone.</li><li>» To take and record accurately any messages and pass on to the appropriate person without delay and action as appropriate</li><li>» To ensure the confidentiality and security of all clients' documentation, including the use of our encryption systems</li></ul>

	<ul style="list-style-type: none"> <li>» To carry out the departmental client care policy</li> </ul>
New enquiries	<ul style="list-style-type: none"> <li>» To triage enquiries into the team in line with the new enquiry rota for secretarial staff, inclusion the completion of intake forms and ensuring that enquiries are passed to the partners for allocation promptly (in line with the firm's new enquiry pledge)</li> <li>» To send out new appointment letters following the conversion of new enquiries including liaising with the file opening team in respect of AML requirements</li> </ul>
Information Technology	<ul style="list-style-type: none"> <li>» To be familiar with the procedures required for the case systems in use including but not limited to will-drafting software, probate case progression software, dictation software and the firm's case management system</li> <li>» To be competent in understanding managing of work on case management system</li> <li>» To use office equipment competently including IT client and case management systems Microsoft products (including Word, Excel, Outlook, PowerPoint and Teams) and the other software used by the team</li> </ul>
Diary Management	<ul style="list-style-type: none"> <li>» To be familiar with the procedures required for the case systems in use including but not limited to will-drafting software, probate case progression software, dictation software and the firm's case management system</li> <li>» To make appointments, arrange meetings and maintain a diary, to be checked against the Fee-earner on a daily basis, including preparing documentation for the meetings as appropriate</li> <li>» Check and maintain key dates diary for matters specific to the relevant Fee-earners</li> </ul>
General	<ul style="list-style-type: none"> <li>» To undertake any other administrative/secretarial duties which from time to time may be allocated including but not limited to scanning, printing, telephoning relevant organisations and contacts and attending upon Will signings as a witness alongside a qualified Fee earner</li> <li>» To be prepared to work at other office sites upon request where it is conducting its business</li> </ul>

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## ABOUT YOU

- » GCSE in English and Maths Grade C or above (or equivalent)
- » Good working knowledge of Microsoft Office 365 and IT systems.

## BEHAVIOURAL COMPETENCIES

We expect every person throughout the firm to exhibit behaviours rooted in our core values, and that each individual fully embodies these values. Our values are:

- » Approachable
  - Good communicator both verbal and written
  - Works well in a team
- » Integrity
- » Professional
  - Can work to deadlines
  - Works well under pressure
- » Dynamic
  - Well organised
  - Can use own initiative
  - Can prioritise workload

## ADDITIONAL INFORMATION

- » This is a full-time office-based role, with working pattern/hours agreed with the Team Leader.
- » This role is offered as an apprenticeship position and will include dedicated study/off-the-job training time during working hours, in line with apprenticeship requirements (for example, a minimum of 7 hours per week, depending on the programme).
- » The apprentice will be supported through regular supervision and progress reviews, including reviews with the training provider where applicable.
- » The duties set out in this job description are not exhaustive and may change in line with business needs, following discussion with the post-holder.

Updated: 17 June 2026