



JOB DESCRIPTION

New Client Administrator



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

Job Purpose

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

Duties and Responsibilities

- » Dealing with the opening of all new client and matter files of each team ensuring that the correct procedures are followed
- » Carrying out client due diligence and identity 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

About You	› GCSE English and Maths Level 4 or above (or equivalent) › Experience in data entry (desirable within a legal environment but not essential) › Confident in using Microsoft Office 365 › Experience of using practice management systems (desirable not essential)
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 » Communicates clearly and professionally in writing and in person, adapting to the audience and confirming understanding. » Works collaboratively with colleagues, sharing information promptly, offering support, and contributing to a positive team environment. › Integrity » Maintains confidentiality and handles client information securely, sharing information only on a need-to-know basis and in line with data protection requirements. › Professional » Behaves professionally in all interactions with colleagues, candidates, new starters and external providers, using tact and discretion, following HR processes, and communicating promptly and accurately. › Dynamic » Organises work and information effectively, maintaining accurate records and keeping HR documentation easy to locate and up to date. » Plans and manages time well, balancing routine administration with ad hoc requests and communicating if timelines are at risk. » Prioritises tasks based on urgency and impact and seeks guidance when priorities conflict. » Shows initiative by progressing tasks independently where appropriate, spotting gaps, suggesting improvements, and checking in when decisions are needed. » Meets deadlines by tracking actions, following up promptly, and keeping relevant people updated on progress. » Works effectively under pressure, maintaining accuracy and professionalism when managing competing demands.