

## JOB DESCRIPTION

Name	#
Role	Post Exchange Assistant
Reports to	Fee Earner/Team Leader
Line Management	N/A
Primary Purpose	To deal with all completions and the majority of post completion procedures from the point of exchange of Contracts through to registration.
<b>Key Responsibilities</b>	<p><b>File Administration</b></p> <p>Deal with exchange letters through to Pre-completion preparation and co-ordinate completions.</p> <p>Preparation of final completion statements and ordering all necessary funds for completion.</p> <p>To oversee and maintain the diaries for completions and registrations.</p> <p>To deal with the ordering of final redemption statements and dealing with the redemption of mortgages completion.</p> <p>To upload all required documentation to Lender Exchange and LMS within the required timescales up to the point of registration.</p> <p>To liaise with clients and agents on completion with a friendly and professional manner.</p> <p>Submission of Stamp Duty Land Tax Returns and payment of Stamp Duty within the 14 day deadline.</p> <p>Deal with post completion accounts and queries to clear balances before archiving.</p> <p>If required, to assist with the submissions of registrations at Land Registry</p> <p>Filing should be undertaken as necessary.</p> <p>Assisting with the processing and allocation of post as required.</p> <p>When requested by Fee Earner, retrieve archived paper/electronic files.</p>

Undertake such work on the file as may be directed by the Fee Earner.

Collect cheques, bank and mark files. When required, request cheques using appropriate forms.

Provide such other administrative assistance on files as may be requested by the Fee Earner.

### **Typing**

Fast, accurate typing to be undertaken under supervision. All typing to be spell checked and proof read prior to passing to Fee Earner. Typing to be prioritising as required.

### **Telephones / Client Contact**

To assist with client enquiries where possible and progress matter accordingly.

Answer the telephone promptly in a professional manner, being polite and helpful at all times. Aim to assist calls of a general nature on your Fee Earner's files.

Ensure messages are recorded with clients name, telephone number, date and time and when possible, details of the query raised. Be realistic in call back options.

Liaise with fee earner as to system regarding direct dial numbers on correspondence and process for taking calls from Reception.

If appropriate type telephone message and place on file.

### **Post**

Aim for all post to be despatched on day of typing. Make sure that Fee Earner has post to sign by 3:45 pm. Arrange for post to be franked and placed in the post bag or DX box.

### **Compliance**

1. To comply at all times with relevant Professional Obligations so far as they relate to your role as a Completions Assistant including those laid down from time to time by:-
  - i) The Solicitors Regulation Authority
  - ii) The Financial Conduct Authority
2. To comply at all times with the Solicitors' Accounts Rules and if aware that your actions may have breached these Rules to notify the COFA to this effect without delay.

3. To be aware of your obligations under the SRA Codes of Conduct to seek to comply with those obligations and if aware that your actions may have breached the Codes to notify the COLP to this effect without delay.
4. To comply with the Firm's Money Laundering Policy/Data Protection Policy so far as they relate to your role as a Completions Assistant.

**Other Duties**

General office administration duties such as photocopying

Whenever possible, provide cover for other team members.

To undertake any other administration duties at the request of Fee Earners, Team Leader, Branch Manager or Business Head.

To ensure compliance with the Firm's Quality Standards.

To be flexible to the remainder of the team

To assist the team in all its duties

Consults with/  
is consulted by

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Fee Earner

Team Leader and Business Head

Branch Manager

Accounts Department