

JOB DESCRIPTION

Name	#
Role	Assistant/Paralegal
Reports to	Fee Earner/Team Leader
Line Management	N/A
Primary Purpose	To provide support to Fee Earners either on a one to one basis or as part of a team.

Key Responsibilities

Residential Conveyancing Specific Duties

- Dealing with the initial client on boarding process
- Providing quotes and taking client's instructions and dealing with the opening of files
Dealing with calls
- Preparing contract documentation and issuing contracts
- Applying for searches and reporting on searches
- Dealing with enquiries on the sale
- Willing to learn and receive full training in due course to report on Freehold purchases and possibly Leasehold purchase transactions and raising additional enquiries
- Reporting to client on Mortgage
- Dealing with exchange of contracts

Typing

Fast, accurate typing mainly opening files on the Case Management system with some copy typing producing correspondence, draft documents and engrossments. All typing to be spell checked and proof read prior to passing to Fee Earner. Typing to be produced in order given unless instructed otherwise.

Case Management

Fully utilise the Case Management system when typing correspondence, telephone notes etc.

Telephones

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 client's 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.

Client Contact

Attending clients on behalf of Fee Earner in Reception and on the telephone for routine matters such as making appointments/collecting documents. If appropriate offer the client the use of the interview rooms.

File Administration

Where applicable and at the request of the Fee Earner write to clients to confirm appointments, book interview room and set up new file.

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

Filing should be undertaken at the request of your Fee Earner. During a Fee Earner's holiday arrange for all incoming/outgoing post to be matched with file and left on Fee Earner's desk for their return. All correspondence during a Fee Earner's holiday should be attached to the inside of the file and the Fee Earner will complete filing upon their return.

When requested by Fee Earner, open files on the Practice Database and when necessary retrieve archived paper/electronic files.

Collect cheques from Accounts Department/Branch Manager, bank and mark files. When required, request cheques using appropriate forms.

Archive both completed paper and electronic files on a regular basis.

Appointment Files

For all appointments arrange for the files to be available for fee earners. Where appropriate check Fee Earner's diary re appointments at other offices to ensure that the files are always with them in advance of the appointment.

Post

Collect post and sort for each fee earner.

Aim for all post to be despatched on day of typing. Make sure that Fee Earner has post to sign by 4.00 pm. If post is not collected, arrange for this to be franked and placed in the post bag.

Compliance

1. To comply at all times with relevant Professional Obligations so far as they relate to your role as an 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 Solicitors Regulation Authority 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 so far as it relates to your role as an Assistant.

Other Duties

General office administration duties such as photocopying and collecting stationery, obtaining files, Deeds and assisting the Department with all administrative duties.

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.

Consults with/
is consulted by

Fee Earner

Team Leader and Business Head

Branch Manager

Accounts Department