

## JOB DESCRIPTION

Name	#
Role	Legal Secretary
Reports to	Fee Earner/Team Leader/Business Head
Primary Purpose	To provide secretarial / organisational support to Fee Earners either on a one to one basis or as part of a team.
Key Responsibilities	
<u>Legal Secretary</u>	<p><b>Typing</b></p> <p>Fast, accurate typing mainly by audio-transcription 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.</p> <p><b>Case Management</b></p> <p>Fully utilise the Case Management system when typing correspondence, telephone notes etc.</p> <p><b>Telephones</b></p> <p>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.</p> <p>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.</p> <p>Liaise with fee earner as to system regarding direct dial numbers on correspondence and process for taking calls from Reception.</p> <p>All telephone messages to be typed and placed on file and emailed or directly communicated to the Fee Earner at the earliest opportunity.</p> <p><b>Client Contact</b></p> <p>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.</p>

## **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 Earners holiday arrange for all incoming/outgoing post to be matched with file and left on Fee Earners desk for their return. All correspondence during a Fee Earners 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 Earners diary re appointments at other offices to ensure that the files are always with them in advance of the appointment.

Ensure any documents required by the Fee Earner at the appointment are placed on the file in good time.

## **Delegated Tasks**

To complete such tasks delegated by the Fee Earner to move a file forward. Examples of which are (but not limited to) contacting utilities companies to close accounts and drafting letters and documents as requested by the Fee Earner to either progress matters or bring them to a close.

To reasonably travel on behalf of the Fee Earner to complete such tasks as (but not limited to) registering a death, arranging a funeral, collecting personal items and distributing them as required and checking on unoccupied properties.

## **Post**

Aim for all post to be despatched on day of typing. Make sure that Fee Earner has post to sign by 3.00 pm. If post is not collected, arrange for this to be franked and placed in the post bag.

## **Other Duties**

Whenever possible, provide cover for other secretaries. Where time permits, pick up digital dictation from others within the department and elsewhere in the Firm.

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.

### **Administration**

General office administration duties such as photocopying and collecting stationery.

Filing daily as and when required in date order on the correct file. Ensuring all relevant enclosures are included and copying for file of all forms etc being forwarded.

### **Wills**

Home visits for signing with Fee Earner

### **Lasting Powers of Attorney**

Questionnaire – when it is received, check it. If there are any gaps missing/or other issues such as notification person, please ring the client first and fill in any gaps on the questionnaire before passing to fee earner. If home visit or other office appointment bring to fee earner's attention so that the document can be drafted in readiness as more cost efficient. Future aims – possibility to draft the LPA's and the covering letters.

### **Court of Protection**

Future aims – sorting out the documentation to lead to drafting the application so that it is set out in different plastic files for assets, liabilities, utilities, tax etc. Once that has been sorted fee earner can then draft the court forms which is more cost efficient.

### **Estate Administration**

Registering death

Arranging funeral

Sorting out the documents – assets, liabilities, utilities, tax, misc

Attending the property to obtain documents and then sorting them

Attending the property as and when needed for collection of stair lifts, return of equipment, meter readings etc

General delegated duties as and when arising to move the Estate forward i.e ring beneficiaries with updates, utility companies etc

Chasing up responses from asset holders/Inland Revenue as directed

### **Management of Affairs**

Attending properties

Sorting out documents – assets, liabilities, utilities etc

Liaising as and when required with various organisations and individuals

Visiting client as and when required

General delegated duties as and when arising to move the estate forward –

i.e ring beneficiaries with updates, utility companies etc

Chasing up responses from asset holders/Inland Revenue as directed

### **Compliance**

1. To comply at all times with relevant Professional Obligations so far as they relate to your role as a Legal Secretary 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 SRA 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, 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 it relates to your role as a Legal Secretary.

Consults with/  
is consulted by

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Fee Earner

Team Leader and Business Head

Branch Manager

Accounts Department