

JOB DESCRIPTION

Name	#
Role	Conveyancing Assistant
Reports to	Fee Earner/Team Leader
Line Management	N/A
Primary Purpose	To provide administrative support and assistance direct to Fee Earners dealing primarily with new instructions, the conversion of quotes, opening of new files and client care throughout the onboarding process.

Key Responsibilities

Specific Conveyancing Roles

- Providing an initial point of contact for clients, both in person and by phone or email.
- Providing quotes and taking client's instructions and dealing with the opening of files
- Dealing with calls from clients, solicitors and agents where possible
- Reviewing and processing clients' completed instruction forms, reviewing ID and Money Laundering checks and making further enquiries with clients where necessary.
- Monitoring the new business inbox for the firm's residential conveyancing department.
- Monitoring the firm's quotation platform and diarising follow ups.
- Obtaining redemption figures and deeds
- Obtaining title documentation from Land Registry
- Requesting Landlord/management packs
- Preparing contract documentation and issuing contracts where asked to do so
- Applying for searches
- Maintaining team and appointment diaries
- Repairs to office equipment (excluding IT equipment)
- Organising team meetings and office events where asked to do so.

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

Achieving a high level of client care in all communications with clients. 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 and matching of post to be undertaken at the request of your Fee Earner.

Maintaining and observing the firm's file protocol procedures.

Processing ingoing and outgoing payments where necessary.

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.

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 a Conveyancing 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 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 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/Data Protection Policy so far as they relate to your role as a Assistant.

Other Duties

General office administration duties such as photocopying and collecting and ordering stationery, obtaining files, checking Fire Alarm system, 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