Charles Russell Speechlys

# Probate Assistant

Job Description

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# Making a difference

**Who we are**

We are an international law firm with a focus on private capital at the intersection of personal, family and business.
Our ability to understand people makes us who we are. We work together to build deep and trusted relationships that deliver meaningful value to our clients. We do this with empathy, attention, and clarity. No jargon, no attitude. We know what matters.

**We are committed to running our business responsibly**

We recognise that our long-term success as a responsible business depends on the health and resilience of our people, our clients, our communities, and our natural environment. We are working hard to ensure that we make a positive contribution for all our stakeholders.

As part of this, we are committed to developing an increasingly diverse, inclusive, and supportive workplace environment where everyone can bring their whole selves to work, feel valued, feel that they belong and can fulfil their potential.

**We understand the benefits of hybrid working.**

We adopt a hybrid working approach, working on a 60/40 split of working in the office and working remotely. This arrangement is non-contractual, dependent on requirements of the role and subject to manager approval.

**What we value**

Our values represent who we are as a Firm. They are designed to guide the way we think, behave, speak, collaborate, and do business. Please see our four core values below.




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# Probate Assistant

We have a fantastic opportunity for a Probate Assistant to join our growing Trust and Probate team, in our wider Tax, Trust and Succession group in Cheltenham. This is a great support role, and the successful candidate will work closely with the Probate solicitors in a busy Probate Service, dealing with high net worth individuals from the UK and abroad. We deal with a wide range of estate administration work and work closely with the wider Tax, Trusts and Succession team, across all offices.

The role will suit someone who has excellent people skills and who is looking to develop their career within a friendly collegiate team that is widely recognised for its expertise in this area. All necessary training will be provided.

## Roles and Responsibilities

The role involves assisting with obtaining Grants of Representation, post grant administration, and distribution of the estates of clients, and includes:

- Obtaining specific details and valuations of the deceased's assets and liaising with financial institutions and valuers in this regard
- Accurately drafting a schedule of assets and liabilities and keeping this up-to-date
- Liaising with foreign intermediaries regarding overseas assets
- Drafting inheritance tax returns and supplementary schedules and liaising with HMRC in this regard
- Drafting applications for probate and letters of administration and dealing with queries raised by the Probate Registry prior to issuing of the grant
- Upon receipt of the grant, preparing the relevant financial paperwork to enable the collection or transfer of the deceased's assets
- Liaising with the private property team regarding sale or transfer of the deceased's property (where relevant)
- Preparing and updating full estate accounts
- Obtaining UK Grants of Representation for foreign residents in relation to UK assets
- Arranging payments and distributions to beneficiaries and third parties in accordance with Firm procedures

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- Liaising with utility providers and the council in relation to supply of services to the deceased's property
- Liaising with estate agents, clearance companies and contractors (where relevant) in relation to the deceased's property
- Collating income and capital gains tax information for accountants/HMRC as applicable
- Drafting simple income tax returns and liaising with HMRC in relation to tax for the administration period.
- Preparing statements of income (form R185) for beneficiaries.
- Any other day-to-day estate administration matters
- Generally supporting the team members
- Keeping managers and Partners regularly updated with progress on assignments and assisting with billing
- You will be expected to be flexible in your approach and willing to undertake a wide range of other fiduciary, financial and tax-related assignments on your allocation.
- You will also be expected to be able to research more complex issues/aspects and new legislation to support other members of the Tax Trusts and Succession division.
- Complying with all relevant and regulatory obligations including the Solicitors Regulation Authority (SRA) Standards and Regulations, and Principles.

## Skills and experience

- Some knowledge and experience of probate and/or private client work is highly desirable
- This role would suit someone working toward CILEX qualification or looking to gain experience prior to working toward the SQE in the future

## Person specification

- Be enthusiastic, willing to learn and keen to pursue a career in probate work
- Demonstrate excellent time management skills
- Be organised and capable of running a significant number of files and work matters simultaneously

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- Have the ability to develop effective working relations at all levels
- Have a high degree of attention to detail
- Be confident in both verbal and written communication with a diverse range of clients
- Have a flexible approach and willing to go the extra mile
- Intermediate knowledge of Excel
- Be a quick learner
- Strong numerical skills and written communication skills
- Have an excellent telephone manner
- Team oriented individual who can also work independently
- Effective, sound decision making and practical problem-solving skills

## Competencies

- Working together
- Inclusive
- Driving high standards
- Client - centric
- Integrity and respect
- Personal impact and growth
- Commercial mindset
- Responsible Business

# Contact

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This job description is not rigid or exclusive and may be adjusted at any time in consultation with the Partners and/or Director of HR to meet the needs of the Firm or the post holder. There is constant review and adaptation to meet the changing needs of the Firm.

Please note in respect of our UK offices, any offer of employment will be conditional upon the successful candidate having the right to reside and work in the UK. In respect of the overseas offices any offer of employment will be subject to being able to obtain the relevant visa. Charles Russell Speechlys is committed to its effort to ensure there is no modern slavery or trafficking in their organisation or supply chain, details can be found on our Modern Slavery Statement. Charles Russell Speechlys is an equal opportunities employer. We respect and support diversity within our workforce.