Charles Russell Speechlys

Associate (5-7 PQE), UK Private Client, Cheltenham

Job Description

Charles Russell Speechlys

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.

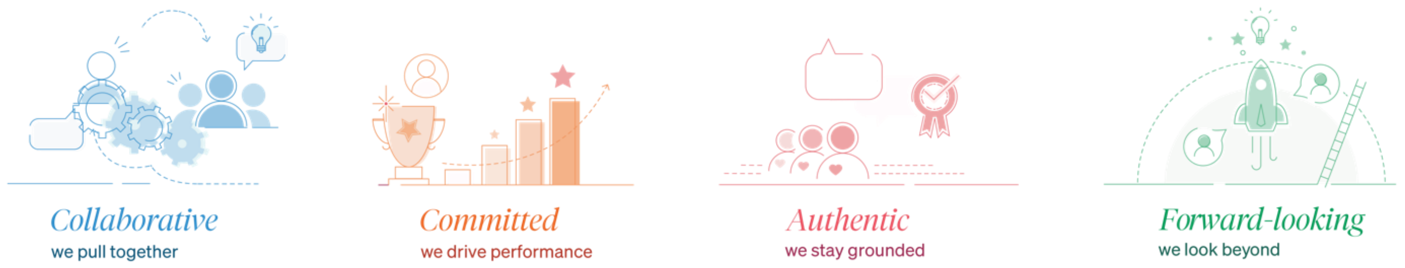
As part of this, we are committed to developing an increasingly diverse, inclusive, and supportive workplace environment where everyone can bring their whole selves to work, feel valued, feel that they belong and can fulfil their potential.

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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Associate

We have a fantastic opportunity for an Associate 5+ PQE to join our UK Private Client to be based in Cheltenham.

We offer City work based in the beautiful Cotswolds with all that has to offer, working in a friendly and nurturing environment. The office size of just over 100 means that there is a strong sense of community and togetherness. With our other UK and international offices, your horizons for the work and clients you will get involved with are limitless, all from our Cheltenham office.

We are looking for a lawyer to work with the Firm's Private Client clients, working for a range of partners within the UK Private Client group. This is an opportunity for those looking to develop their careers within a friendly collegiate team that is widely recognised for its expertise in this area.

Core to the team's client base are investors and entrepreneurs; landed estates and heritage property; and professionals and senior executives. Some client work has an international element, but experience of international matters is not essential.

The team works closely with the Firm's Private Property, Trust and Tax teams across all of the UK offices and some international offices. We offer a dedicated personal service for our clients; we work hard to develop and build lasting relationships and truly get to know our clients to deliver a premium service.

The Cheltenham office team consists of three Partners (whose brief biographies are set out below), one Senior Associate, six Associates, one Trainee, a Probate Assistant, a Senior Tax Advisor and a Trust and Tax Assistant.

The recruit will be working primarily with the Cheltenham office Partners and there will be an opportunity to work with other Partners in the wider UK Private Client group. The successful candidate will, therefore, develop broad experience, whilst developing a more specialised expertise in the type of work that the team's core client base requires.

Henry Fea has a broad range of experience gained from working in both the UK and Switzerland. His domestic work includes advising on tax and succession planning, the establishment and operation of trusts and charities, landed estates, heritage property, UK Wills, probate, and the administration of estates. Internationally he advises on tax and trust matters and he has particular expertise in advising on becoming, and ceasing to be, UK resident, the establishment and operation of offshore trusts and ownership structures for UK property. He has extensive experience of advising on regularising tax affairs in the UK and abroad. Henry's clients include UK domiciled and non-UK domiciled individuals, families, trustees, foundations, foreign lawyers, banks, private companies, and trust companies, and he regularly works alongside other professionals.

Julia Cox has considerable experience in a broad range of private client matters involving all aspects of estate and succession planning. Her clients include UK and international individuals, their families, and trustees. She regularly acts for UK entrepreneurs, business owners and high net worth individuals, as well as non-UK domiciliary. She has acted for many corporate and individual trustees, both UK and non-UK resident, as well as other private client service providers.

Mary Perham has a broad range of experience in private client matters, advising on trust, estates, and tax planning. Her practice encompasses both domestic and cross-border work with a particular focus on business owners and landed estates, including the creation and administration of trust structures, estate administration, PTCs, Variations of Trust and tax-efficient wealth preservation strategies. She has particular expertise in the tax and governance structuring of family investment companies. Mary regularly works alongside the firm's private wealth disputes team on matters with contentious aspects.

We advise on every aspect of succession and tax planning, at all levels of the team – and we strive for excellence and empower our colleagues to do so. Forming an integral part of the wider UK Private Client group, the Associate will advise a range of UK clients on their succession and tax planning, where the estates in question will often be complex, and of high value.

Roles and Responsibilities

- Provide practical and commercial legal advice to clients in a clear and succinct manner
- Manage a substantial and varied workload efficiently and cost-effectively with supervision, appropriate to the level of expertise
- Draft more complex documents with minimum instruction and supervision, making use of appropriate precedents
- Apply a commercial approach to research and evaluate relevance and accuracy in delivery of advice
- Where appropriate, delegate, co-ordinate and supervise the work of more junior members of the team
- Actively participate in client marketing opportunities such as client seminars, presentations and pitches
- Identify client opportunities and take appropriate steps to follow through
- Contribute to group knowledge and know-how initiatives
- Comply with all relevant and regulatory obligations including the Solicitors Regulation Authority (SRA) Standards and Regulations, and Principles.

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Person Specification

- Qualified Solicitor or CILEX qualified with ideally 5-7 years' PQE.
- A STEP qualification would be an advantage but is not essential.
- Excellent knowledge of the law and practice in relation to the administration of estates.
- A thorough understanding of inheritance tax and trusts.
- Experience working in a similar role, or looking to move up to a more senior role
- Possess excellent team working skills with the ability to collaborate with colleagues of all levels, including mentoring and guiding less experienced members of the team as required
- Demonstrate good judgement and a good legal and commercial understanding of clients' particular needs
- Take a 'hands on' approach to managing own files and a broad case load
- Demonstrate excellent communication skills and be able to develop and maintain client relationships amongst a diverse group of clients.
- Be organised and have the authority to tackle difficult issues as and when they arise.
- Be capable of running a significant number of files and work matters simultaneously.
- 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.

Competencies

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

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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.