

POSITION DESCRIPTION – LEGAL PERSONAL ASSISTANT

SECTION A:

Employer:	Saunders Robinson Brown (SRB)
Position Title:	Legal Personal Assistant
Reporting To:	Property Principal
Location:	Christchurch
Functional Relationships:	Internal Property Team Professional Staff External Clients

SECTION B:

Position Objective: The Legal Personal Assistant position would provide support to the Property Principal and the wider Property Team. The role would be responsible for providing legal secretarial and personal assistant support services to authors to support them to run an efficient and effective property practice. Responsibilities include assisting to coordinate the workflow in the team, managing conveyancing end to end processes, typing digital dictations, researching and presenting material, utilising OnePractice and file management.

You will liaise with existing clients with a view to developing those relationships and maintaining a high level of client service.

Background: From offices in Christchurch and Rangiora, the experienced team at Saunders Robinson Brown Limited (SRB) provides professional legal advice on commercial and company law, property law, trusts and estates, civil litigation and dispute resolution, family law and employment law. In addition to these core practice areas, SRB also provide specialist advice in insurance law, sports law and rural law. SRB prides itself on their approachable, client-centred culture, and commitment to ensuring an integrated and relationship focused approach throughout the firm.

Staff Numbers: Partners – 15
Staff – 85 including Partners

SECTION C: KEY TASKS AND SPECIFIC ACCOUNTABILITIES

1. Secretarial/Personal Assistant

Deliver secretarial and personal assistant support services, ensuring adherence to best practice, standardised processes and procedures.

Key Responsibilities:

- Support Property Fee Earners to run an efficient and effective practice:
 - Assist with the coordination of workflow in the team between the authors
 - Proactively manage and streamline administration processes and look for continuous improvements in processes for efficiencies and quality to enhance customer service
- Provide administrative support:
 - Complete digital dictations, correspondence and documents using precedent forms and legal forms
 - Prepare, format and amend complex legal documents
 - Quality control of legal documents
 - Prepare, update and maintain excel spreadsheets
 - Organise team meetings and take minutes
 - Maintain and update Fee Earner calendars
 - Billing, invoicing and general accounting duties
 - Take phone calls, enquiries and requests and handle them when appropriate
- File management:
 - Assist the Fee Earners with their file management
 - Open and close files in accordance with firm policy
 - Follow up with clients by email or phone
 - Photocopying, printing, scanning, binding and filing
 - Electronic document management
- AML:
 - Provide AML support to all Fee Earners
 - Working knowledge of AML legislation and best practice
- Support the Legal Assistants with conveyancing processes:
 - Interpretation of Sale and Purchase Agreements
 - Draft initial letters for sale and purchase or relevant subdivision information
 - Deal with relevant Council and Real Estate Agents
 - Liaise with clients and relevant solicitors on behalf of Fee Earners
 - Maintain and release e-dealings

2. LINZ/Companies Office/Sales Direct

Research, digest, analyse and present material clearly and concisely.

Key Responsibilities:

- Attend to title, instrument and DP searches on LINZ
- Set up and maintain e-dealings
- Attend to PPSR searches
- Attend to company searches through Companies Office
- Draft and finalise Notices of Sale through Sales Direct

3. OneLaw

Utilise OneLaw to carry out responsibilities in an efficient manner.

Key Responsibilities:

- Set up Transaction Request payments and receipts (TQ)
- Maintain and update Transaction Request payments prior to settlement
- Draft Trust Account statements and bills for checking and approval
- Draft bills as required from Work In Progress list
- Set up and maintain workflow
- Update and maintain client information
- Ensure that client identification is scanned and linked

4. Professional Development

Ensure your on-going professional development in agreement with the Property Practice Group Leader.

Key Responsibilities:

- Attend relevant and value adding professional courses to keep up to date with administration, secretarial and personal assistant best practice

5. Other Tasks

Carry out other tasks and duties as and when required.

Key Responsibilities:

- Be an active member within the PA group and support the broader team when needed
- Attend team, staff and PA meetings as required
- Build and maintain excellent internal relationships contributing to SRB's culture and positive working relationships
- Manage work in conjunction with supervisor
- Assist Fee Earners to work within the firm's financial management practices
- Ensure duties are carried out in a timely and accurate manner, and in accordance with SRB's policies and procedures

- Undertake all other duties that are reasonably requested from time to time

SECTION D

Experience

- A minimum of 2 years' legal experience
- Conveyancing experience advantageous

Skills and Knowledge

- Exceptional interpersonal skills
- Exceptional communicator, both written and verbal
- Proactive approach with the ability to take initiative
- Continuous improvement focus
- Ability to quickly establish rapport and build excellent and positive working relationships with internal and external clients
- Excellent organisation, time-management and prioritisation skills with the ability to work under pressure and to tight deadlines
- Excellent computer skills and advanced knowledge of the Microsoft 365 suite
- Knowledge of OneLaw practice management system would be advantageous
- Understanding of confidentiality issues and conflict of interest
- Accuracy and quality focus with an exceptional eye for detail
- Ability to understand conveyancing transactions with a knowledge of the legal documents
- The ability to research, digest, analyse and present material clearly and concisely

Personal Attributes

- Forward thinking and action orientated
- Determination, perseverance and resilience
- Methodical, practical and conscientious
- Adaptable and reliable
- Team focussed
- Integrity