

POSITION DESCRIPTION – TRUSTS & ESTATES SOLICITOR

SECTION A

Employer:	Saunders Robinson Brown Limited (SRB)
Position Title:	Solicitor
Reporting To:	Trusts & Estates Practice Group Leader Trusts & Estates Senior Associate
Location:	Christchurch Rangiora

SECTION B

1. Position Objective

The Solicitor will provide support to the firm and clients as part of the Trusts & Estates practice group. You will be involved with the provision of high-level trust and estate structuring, reviews, advice and opinions, together with general trust administration matters and drafting and advice in respect of Wills and Enduring Powers of Attorney.

You will work closely with other members of the Trusts and Estates Team, as well as clients, with a view to developing those relationships and maintaining a high level of client service.

2. Background

From offices in Christchurch and Rangiora, the experienced team at Saunders Robinson Brown (SRB) provides professional legal advice on commercial and company law, property law, trusts and estates, dispute resolution and civil litigation, family law and employment law. SRB prides itself on their approachable, client-centred culture, and commitment to ensuring an integrated and relationship focused approach throughout the firm.

3. Staff Numbers

Partners:	14
Staff:	90 including Principals

SECTION C - KEY TASKS AND SPECIFIC ACCOUNTABILITIES

4. Trusts & Estates Support

Provide timely and accurate day to day guidance and Trusts & Estates support to the firm and clients ensuring adherence to best practice, standardised processes and procedures.

Key Responsibilities:

- (a) Receive instructions from Trusts & Estates partners/senior team members and clients
- (b) Attend to and assist as required with all matters relating to clients and their trusts:
 - (i) Formation of Trusts
 - (ii) Trust and Estate reviews
 - (iii) Trust and Estate structuring / restructuring advice and implementation
 - (iv) Incorporation of Trustee Companies
 - (v) Advising on and implementation of the resettlement and winding up of Trusts
 - (vi) Property/asset transfers to or by client's trusts
 - (vii) Review trust financial accounts and associated documentation including bank documentation
 - (viii) General Trust administration including distributions, resolutions etc
 - (ix) Assist with administration of client gifting programmes
- (c) Drafting wills and powers of attorney, including disclosing EPAs
- (d) Attend to settlements and all matters relating to settlements
- (e) Build relationships with clients and meet, telephone or email clients to advise on or report on matters and to deliver exceptional client service
- (f) Correspond with other lawyers, legal executives, accountants, banks and other professionals
- (g) Invoice clients
- (h) Report to clients and supervising team members

5. Professional Development

Ensure your on-going professional development in agreement with the Trusts & Estates practice group leader.

Key Responsibilities:

- (a) Attend relevant and value adding professional courses to keep up to date with Trusts & Estates law best practice
- (b) Undertake own research and reading; engage in legal discussion with others within the Team about topical issues; write topical articles and papers and give presentations (both internally and externally)

6. Other Tasks

Carry out other tasks and duties as and when required.

Key Responsibilities:

- (a) Be analytical and inquiring in your approach to matters
- (b) Have (or develop) excellent legal drafting skills
- (c) Be efficient, well organised and manage time effectively to help with the workflow in the team
- (d) Promote the firm's expertise by contributing to team marketing and increasing the firm's client base
- (e) Deliver an excellent customer experience by providing genuine value to our clients in everything we do, to make a real difference for our clients
- (f) Being an active member within the fee earners group and attend all meetings
- (g) Build and maintain excellent internal relationships contributing to SRB's culture and positive working relationships
- (h) Manage work in conjunction with your supervisor
- (i) Work within the firm's financial management practices and procedures
- (j) Complete non-chargeable productive tasks as assigned
- (k) Undertake legal research and draft opinions as required
- (l) Duties are carried out in a timely and accurate manner, and in accordance with SRB's policies and procedures
- (m) Undertake all other duties that are reasonably requested from time to time

SECTION D

7. Qualifications

Tertiary qualification in Law

8. Experience

Up to 2 years' legal experience

9. Skills and Knowledge

9.1 Exceptional interpersonal skills with the ability to quickly establish credibility, have the personal impact and build excellent working relationships with internal and external clients

9.2 Exceptional communicator, both written and verbal

9.3 Excellent organisation, time-management and prioritisation skills

9.4 Well-developed computer skills

9.5 Ability to work collaboratively in a team to support other team members

9.6 Financial management skills

9.7 Strong analytical and research skills

9.8 Accuracy focus with an exceptional eye for detail