

POSITION DESCRIPTION – SENIOR SOLICITOR/SENIOR LEGAL EXECUTIVE - ESTATES

SECTION A:

Employer:	Saunders Robinson Brown (SRB)
Position Title:	Trusts & Estates Senior Solicitor/Senior Legal Executive
Reporting To:	Trusts & Estates Practice Group Leader
Location:	Christchurch
Functional Relationships:	Internal Trusts & Estates Practice Group Professional Staff External Clients External Partners

SECTION B:

Position Objective:	The Senior Solicitor/Senior Legal Executive will provide support to the firm and clients as part of the Trusts & Estates practice group. You will manage a varied and rewarding caseload focused on estates law and 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.
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, 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 – 16 Staff – 80 including Partners

SECTION C: KEY TASKS AND SPECIFIC ACCOUNTABILITIES

1. Trusts & Estates Support

Provide timely and accurate day to day guidance and Trusts & Estates support to the firm and clients.

Key Responsibilities:

- Receive instructions from Trusts & Estates partners/senior team members and clients
- Oversee high level trust structuring, re-structuring and reviews
- Advise on and draft wills and enduring powers of attorney
- Undertake retirement village work
- Provide estate and trust opinions and advice
- Attend to and assist with general trust administration matters and advice
- Attend to settlements and all matters relating to settlements
- Build relationships with clients and meet, telephone or email clients to advise on or report on matters and to deliver exceptional client service
- Correspond with other lawyers, legal executives, accountants, banks and other professionals
- Invoice clients
- Report to clients and supervising team members

2. Professional Development

Ensure your on-going professional development in agreement with the Trusts & Estates Practice Group Leader.

Key Responsibilities:

- Attend relevant and value adding professional courses and programmes to keep up to date with Trusts & Estates Law best practice
- 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)

3. Other Tasks

Carry out other tasks and duties as and when required.

Key Responsibilities:

- Be analytical and inquiring in your approach to matters
 - Have (or develop) excellent legal drafting skills
 - Be efficient, well organised and manage time effectively to help with the workflow in the team
 - Being an active member within the fee earners group and attend all meetings
 - Manage work in conjunction with your supervisor
 - Build and maintain excellent internal relationships contributing to SRB's culture and positive working relationships
 - Work within the firm's financial management practices
 - Contribute to building the capital fabric and the general well-being of the firm
 - Complete non-chargeable productive tasks as assigned
 - Undertake legal research and draft opinions as required
 - 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
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SECTION D

Qualifications

- Tertiary qualification in Law or
- NZLS Legal Executive Diploma or
- The New Zealand Diploma in Legal Executive Studies from 2017

Experience

- 2-5 years' legal experience
- Experience in Estates, Wills and Property is preferred

Skills and Knowledge

- Strong academics
- Exceptional interpersonal skills with the ability to quickly establish credibility, have the personal impact and build excellent working relationships with internal and external clients
- Exceptional communicator, both written and verbal
- Ability to quickly establish credibility, have the personal impact and build excellent working relationships with internal and external clients
- Excellent organisation, time-management and prioritisation skills
- Well-developed computer skills
- Ability to work collaboratively in a team to support other team members
- Knowledge of One Law advantageous
- Financial management skills
- Strong analytical and research skills
- Business development skills
- Accuracy focus with an exceptional eye for detail
- Independent thinker who takes initiative

Personal Attributes

- Analytical and inquiring with an eagerness to learn
- Forward thinking and action orientated
- Determination and perseverance
- Resilience
- Methodical, practical and conscientious
- Adaptable
- Empathetic