Saunders Robinson Brown

POSITION DESCRIPTION – TRUSTS & ESTATES PERSONAL ASSISTANT – FIXED TERM

1. SECTION A

Employer:	Saunders Robinson Brown (SRB)
Position Title:	Trusts & Estates Personal Assistant – Fixed Term
Reporting To:	Trusts & Estates Practice Group Leader
Location:	Christchurch
Functional Relationships:	Trusts & Estates Team Professional Staff Clients

2. SECTION B

2.1 Position Objective

The Fixed Term Personal Assistant would provide a professional first point of contact with people from both inside and outside the firm and perform all duties as required in a timely manner. The role would be responsible for delivering secretarial and personal assistant support services to the Trusts & Estates team.

You will liaise with Trusts & Estates Fee Earners and clients with a view to developing those relationships and maintaining a high level of client service.

2.2 Background

From offices in Christchurch and Rangiora, the experienced team at 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 provides specialist advice in insurance law, sports law and rural law. SRB prides itself on having an approachable, client-centred culture, and commitment to ensuring an integrated and relationship focused approach throughout the firm.

2.3 Staff Numbers

Partners:	16
Staff:	80 including Partners

3. SECTION C - KEY TASKS AND SPECIFIC ACCOUNTABILITIES

3.1 Personal Assistant Support

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

Key Responsibilities:

(a) Providing responsive administrative support:

(i) Complete digital dictations, correspondence and documents using precedent forms and legal forms within the requested timeframe.

(ii) Prepare, format and amend legal documents.

(iii) Quality control of legal documents.

(iv) Prepare, update and maintain excel spreadsheets.

(v) Bill, invoice and perform general accounting duties.

(vi) Take phone calls, enquiries and requests and handle them when appropriate.

(vii) Proactively manage the internal process for Will reviews.

(b) File management:

(i) Assist the fee earners with their file management.

(ii) Open and close files in accordance with firm policy.

(iii) Prepare Engagement letters.

(iv) Photocopy, print, scan, bind and file documents appropriately.

(v) Prepare files for meetings, author attention and appropriate action.

(vi) Electronic and physical document management.

(vii) Assist with scanning and filing of deeds.

(c) Anti-Money Laundering:

(i) Provide Anti-Money Laundering (AML) support to all assigned fee earners.

3.2 OneLaw

Utilise OneLaw Practice Management system to carry out responsibilities in an efficient manner.

Key Responsibilities:

(a) Set up Transaction Request payments and receipts (TQ).

(b) Set up Journal transactions to be completed by the Trust Accountant.

(c) Draft Trust Accountant statements and bills for checking and approval.

(d) Draft bills as required from Work in Progress list.

(e) Update and maintain client information.

(f) Scan and link documents.

(g) Ensure that client identification is scanned and linked.

3.3 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 administration best practice.

3.4 Other Tasks

Carry out other tasks and duties as and when required.

Key Responsibilities:

(a) Be an active member within the PA group and support the broader team when needed.

(b) Attend team and staff meetings as required.

(c) Build and maintain excellent internal relationships contributing to SRB's culture and positive working relationships.

(d) Manage work in conjunction with supervisor, alert your supervisor immediately if you become aware of any circumstances that may give rise to a claim under professional indemnity insurance policy.

(e) Assist Fee Earners to work within the firm's financial management practices.

(f) Ensure duties are carried out in a timely and accurate manner, and in accordance with SRB's policies and procedures.

(g) Undertake all other duties that are reasonably requested from time to time.

4. SECTION D

4.1 Experience

(a) Previous experience in a professional services environment or similar.

(b) Previous experience in the legal industry and AML advantageous.

4.2 Skills and Knowledge

(a) Exceptional interpersonal skills.

(b) Exceptional communicator, both written and verbal.

(c) Pro-active approach with the ability to take initiative.

(d) Continuous improvement focus.

(e) Ability to quickly establish rapport and build working relationships with internal and external clients.

(f) Excellent organisation, time-management and prioritisation skills with the ability to work under pressure and to tight deadlines.

(g) Excellent computer skills and knowledge of the Microsoft 365 suite.

(h) Knowledge of OneLaw practice management system would be advantageous.

(i) Understanding of confidentiality issues and conflict of interest.

(j) Accuracy and quality focus with an exceptional eye for detail.

(k) The ability to research, digest, analyse and present material clearly and concisely.

4.3 Personal Attributes

(l) Forward thinking and action orientated.

(m) Determination, perseverance and resilience.

(n) Methodical, practical and conscientious.

(o) Positive attitude and enthusiasm for the role.

(p) Adaptable and reliable.

(q) Team focused.

(r) Integrity