David Allen

Job Description

Name	
Job Title:	Business Assistant: Estates Planning
Department:	DACA – Wills and Probate
Line Manager:	Wills Specialist and Team Leader
Line management responsibilities:	None

Aims and purpose of the job

To assist with the effective, compliant and client-friendly estates planning and will-writing service to David Allen clients, thereby adding value to, and supporting, the Estates Planning Team in their corporate objectives and client services.

To assist with the effective operation and promotion of the David Allen Wills and Estates Planning service to generate new client relationships and referrals thereby contributing to team business objectives.

Key Duties & Tasks to include:

1.	**Client Meetings** • To set up appointments for the Will Writers to see clients for instructions and the delivery of advice. • To assist with the collection and collation of personal and financial data from clients in order that they can be provided with appropriate and best advice relating to their options for wills and estates planning and the implications flowing from it. • To appropriately identify the client's needs and expectations in relation to their wills and inheritance planning. • To assist in taking full and accurate instructions from clients through face-to-face meetings or remote contact. • To take sign-off appointments with clients.
2.	**Document Preparation & Client Records** • To be able to draft, prepare and register wills, Lasting Powers of Attorney and other estate planning documentation, of varying degrees of complexity, together with any ancillary documents and correspondence. • To be able to prepare these documents according to clients' instructions, in a timely manner, and in full compliance with statutory and regulatory requirements and with the standards and criteria required by the Institute of Professional Will Writers. • To accurately maintain client records and correspondence on company systems (using VC and Microsoft), making sure that all compliance and regulatory standards are met and that client information is secure at all times.

3.	**Communication** • To communicate with clients and any external parties to ensure they are kept fully informed as to progress. • To respond to telephone and other enquiries relating to wills and estates/ inheritance; and to deal with all communications in a timely manner ensuring the highest professional standard.

4.	**Administrative & Business Support**
	
	• To assist in managing and undertaking all department administration including incoming and outgoing post, sorting and filing of all correspondence, providing cover for the administrators when required.
	• To assist or provide cover for all administrative tasks, including but not limited to:
	    ○ Management of team diaries and booking appointments with clients;
	    ○ Preparation of information packs ahead of client meetings;
	    ○ Sending documents to clients including copy wills, draft wills, LPAs, ensuring all documentation is produced to the highest standards and in accordance with current legislation;
	    ○ Liaison with clients to gather information;
	    ○ Sending out invoices.
	• To plan, manage and prioritise your own workflow to ensure your targets and deadlines are met.
	• To work with and support the wider team in order to help manage the team caseload and to ensure team targets relating to fees, financial targets and referrals can be met.
	• To communicate regularly and effectively with your line manager so that they are aware of the status and progress of client work at all times and where there may be risks or issues that would affect the satisfactory completion of your client cases.

5.	**Professional Development** • To undertake and engage with professional training. • To continually develop and improve your knowledge relating to the statutory, regulatory and best practice provisions relating to will-writing and estates planning, to ensure a high and professional standard of will-writing and estates planning service to clients. • To develop your knowledge and understanding of the clients with which you work, thereby ensuring you meet client and team expectations, deliver the highest level of service and make sure the client feels that they are well looked after. • To continually look for was to improve and develop the department and its efficiencies, ensuring streamlined and accurate processing at all times.
6.	**Business Development** To develop and introduce or refer clients into other areas of the David Allen businesses thereby establishing new client relationships.

Central duties:

7.	To represent the business when required to ensure positive links, relations and networks.
8.	To showing an understanding and commitment to diversity, equal opportunities and anti-discriminatory practices.
9.	To undertake the personal development necessary to ensure effective performance in the role.
10.	To participate in relevant and appropriate training and development as required.
11.	To undertake any other duties commensurate with your skills, knowledge and experience, as may be reasonably requested of you from time to time.
12.	To demonstrate the David Allen values of ambition, professionalism, knowledge, integrity, and respect in the work you do and during your appointment.

Method of working

The David Allen Group expects all staff to work effectively, both as individuals and as part of a team, delivering high quality services and support to clients and staff. In doing so, the company expects all staff to display all of the core competencies as defined in the performance and development appraisal arrangements and to conduct themselves in a manner which befits their professional status and responsibilities.

Public relations

Considerable importance is attached to the role the business plays in its various communities. It therefore follows that all staff are expected to work to maintain and develop these relationships at every opportunity by positively promoting the work of the business and the role it can play in supporting the aims of its stakeholders.

This job description is a guide to the work the post holder will be required to undertake. In consultation with the post holder, it may be amended from time to time by the line manager to meet changing circumstances or business needs. Specific targets and objectives will be agreed with the post holder and will be reviewed regularly as part of the performance management arrangements.