



Job Description

Job Title:	Paralegal	Location:	TBC
Responsible To:	TBC	Department:	TBC

Main purpose of the role:

- Provide Legal Practitioners with excellent support and clients with an excellent service.
- Sustainably achieve financial objectives including time recording and billing.
- Work compliantly to regulatory internal quality standards.

Duties and responsibilities include but are not limited to:

- On-board new clients by promptly taking enquiries and sending appropriate SOS documentation.
 - Assist prospective clients by identify their legal need and organising appropriate next steps
 - Open new matters within SOS and a Document Wallet for physical items
 - Produce client care documentation within SOS and send to clients
 - Ensure client GDPR preferences are recorded on the matter
- Prepare compliance for the Legal Practitioner to review and approve inc:
 - Reviewing and scanning client ID and Source of Funds documents
 - Completing electronic AML checks
 - Completing Conflict of Interest searches
 - Maintaining an updated Risk Analysis and Matter Summary form
- Complete legal tasks to progress matters as supervised by the Legal Practitioner, examples include:
 - Review incoming and drafting outgoing documents
 - Calling or meeting, in person or via Teams, clients and third parties
 - Setting reminders and key dates in SOS
 - Conducting research using the Legal Library and other sources as required
 - Completing transactions as appropriate e.g. Exchanges and Completions
- Manage the matters finances as directed and reviewed by the Practitioner including:
 - Completing Posting Slips including Matter Expenses
 - Drafting invoices
 - Recording Chargeable and Non chargeable Time
- As required aid Assistants through conducting other reasonable tasks, for example:
 - Opening new matters and sending client care documentation
 - Archiving matters and sending end of matter documentation
 - Requesting documents via the Document and File Movement script
 - Allocating post via the Post Room script
 - Provide cover for reception

Salary and benefits:

- A salary of £TBA
- Employee pension scheme
- Company sick scheme
- Sponsored training
- 24 days of annual leave plus bank holidays
- Life assurance
- Opticians scheme
- Staff discount

