**Job Profile**

**Conveyancing Legal Assistant – Grade 3**

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| **Purpose of role** | **To provide administrative conveyancing support to fee-earners in the Residential Conveyancing Dept.** |

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|  | Grade 3 – KPIs | Proposed tasks within KPIs |
| Technical skills and application | Building on a range of technical, admin or operational skills to effectively carry out role | * Ability to be totally confidentiality and securely manage all company and client documentation and/or information
* Core skills to include, but not exclusively:
	+ Accurate and fast keyboard skills, processing via digital dictation, copy typing.
	+ Effective diary management skills for fee-earners
	+ Effective organisational and administrative skills
	+ Task flow (training to be given)
	+ HMRC website (training to be given)
	+ SDLT website (training to be given)
	+ Lawyer Checker website (training to be given)
	+ HTB ISA website (training to be given)
	+ STARS (training to be given)
	+ NHBC website (training to be given)
* IT skills (word, excel, outlook and Company OMS systems)
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| Decision making and problem solving | Ability to identify day to day issues and takes the initiative to find solutions | * Day to day responsibility for all tasks to include taking the initiative to find solutions to issues before escalating up to fee-earners for approval.
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| Delivering quality/customer service (internal and external) | Can identify any issues with client service and makes suggestions for improvement | * Open files - Make initial calls to clients prior to file opening to obtain any missing information required to open files and to explain communications procedure (who to contact etc.)
* Processing client questionnaires contacting clients if necessary to ensure that all required information is entered on to system.
* Awareness of any job creep and notify fee earner.
* Identifying where existing processes can be improved and escalating up to the Department Manager for approval prior to implementation.
* Ensure that requests for wills, financial services or surveyor recommendations are brought to the attention of the Fee Earners
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| Communication | Demonstrates the ability to motivate others, both internally and externally, through effective communication.  | * Efficient and effective in dealing with existing clients on the phone and in person
* Dealing courteously with third parties to ensure no problems arise
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| Effective management of work/ organisation | Pro-actively ensures that own and/or team workloads are manageable and delegates appropriately to ensure team needs are met. | * Liaises with fee-earners to ensure all tasks done in order of priority referring to the Dept. Manager if any issues arise
* File administration (opening, filleting and closing)
* Photocopying and scanning including all ID and proof of address documentation
* Check/claim/chase monies due from clients throughout transaction
* Prepare e-chits for receipt of such monies/funds/mortgage advances
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| Team working | Actively participates and encourages others to work as part of the team and to achieve objectives set | * Manages own time for maximum benefit to the team.
* Pro-actively engage in any learning and development activities that will further the performance of the team
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| Complexity | Ability to cope with a varied workload, consisting of a number of different elements which are broadly related to one another and exercising a variety of skills |  **In relation to purchase of properties*** Carrying out initial searches and download results and reference each individual search separately by name on OMS
* Interim billing of search pack upon receipt of all search results
* Where appropriate to experience and matter type raising enquiries and prepare, compile and bind up reports on title and send out with supporting documentation (draft SDLT/Contract, FS etc.) for signature by client
* Perform Lawyer Checker searches pre-exchange and pre-completion and report **all** results to fee earner immediately
* Send out report on mortgage with mortgage deed for signature
* Exchange contracts (if authorised to do so by fee earner with responsibility)
* Deal with all post exchange formalities
* Prepare files for completion (prepare straightforward TR1’s, reply to requisitions, prepare and submit Certificate on Title, prepare draft financial statements prepare e-chits for signature,
* Deal with completion formalities
* Complete post completion registration or prepare file to pass to post completions assistant

I**n relation to sale of properties*** Prepare contract pack
* Write to lender for initial redemption figures
* Send out contracts to clients for signature prior to exchange
* Where appropriate to experience and matter type take clients instructions and reply to enquiries
* Exchange contracts (if authorised to do so by fee earner with responsibility)
* Deal with all post exchange formalities
* Prepare files for completion (submit TR1 to client for signature, raise requisitions, obtain final redemption figure, prepare draft financial statements, prepare e-chits for signature)
* Deal with completion formalities
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| Effort and Commitment | Input influences team objectives being met | * Appropriate understanding of and ability to work within all Company’s policies and procedures required for the role at grade 3 level.
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