Job title	Private Client Legal Advisor
Department	Private Client

Job Purpose and Overview

The primary focus of this role is to provide expert advice on a range of private client matters, including Probate, Wills, Trusts, Inheritance Tax, LPA's and Deputyship. Working closely with the Private Client Legal & Strategic Leads, People Leads and other team members to ensure that all cases are managed efficiently and professionally. You will be confident working autonomously while also contributing to the growth and development of less experienced team members by helping to develop their technical skills, knowledge and confidence in handling private client matters. We foster a supportive, collaborative environment where learning and growth are encouraged.

Key tasks and Accountabilities

- Manage a full and varied caseload of private client matters
- Working on a variety of probate matters, including complex, high-value, and taxable estates
- Prepare and submit probate applications (both online and paper) and IHT400 forms
- Calculation of Inheritance Tax, Income Tax and Capital Gains Tax in estates
- Draft detailed estate accounts, deal with the collection and distribution of assets, and handle cross-border elements where applicable
- Experience with NRB trusts and their implementation and taxation
- Experience with processes and documentation around NRB trusts and appointments and closures and the implications thereof
- Liaise with executors, beneficiaries, HMRC, financial institutions, and the Probate Registry
- Advising clients and families on all aspects of estate planning, including the structuring and preservation of wealth across generations and ensuring that they align with their personal, financial and family goals
- Advising on and preparation of a variety of trusts, ensuring compliance with relevant legal and tax frameworks and that solutions are compliant, tax efficient and aligned with the clients' long-term objectives
- Keep up to date with changes in private client law, inheritance tax, and best practices
- Ensure strict compliance with CLC and firm-wide procedures, including AML and data protection protocols
- Provide empathetic and practical support to clients throughout the process
- Support, mentor, and supervise junior team members, offering guidance, technical oversight, and feedback as needed

Experience

- Minimum of 4 years' experience in private client law, specifically in Probate, Wills, Trusts, Inheritance Tax, LPA's and Deputyship. A formal qualification is advantageous
- Proven ability to manage complex matters independently with minimal supervision
- In-depth knowledge of inheritance tax reporting, estate taxation, and probate processes
- Experience with international estates, trusts, or business succession matters
- Experience supervising or mentoring others, formally or informally
- A strong focus on customer service, with a natural ability to build rapport and provide empathy, respect and a responsive experience for clients.
- Comfortable working under pressure, managing deadlines, and prioritising workloads
- Proficient in legal case management systems and Microsoft Office

Skills & Attributes

- Self-motivated with the ability to motivate others
- Strong problem-solving skills
- Excellent communication and interpersonal abilities
- Effective time management and ability to prioritise workloads
- High attention to detail and commitment to quality
- Positive, approachable, and supportive
- Resilient under pressure with a can-do attitude and a focus on solutions
- Passionate about delivering great client service
- Able to work independently and collaboratively within a team
- Show commitment to our core values and work with these on a daily basis, both demonstrating them in the way you approach the role but also promoting them to colleagues