



JOB DESCRIPTION

JOB TITLE: **Accounts Preparer / Administrator Estates and Delegate**

Benest & Syvret is a successful and respected legal practice which is undergoing a period of growth and business structure change. We take pride in the personal care that we provide to our clients and the practical problem-solving approach given to all legal services. We look for continuous improvement in everything we do together with a customer focus.

Job Summary:

The main responsibilities of the role are to:

- Prepare annual delegate accounts and plans
- Prepare income tax returns
- Undertake Delegate and Probate administration and to manage all client work in accordance with detailed procedures and quality standards
- Prepare Estate accounts
- Assist in probate cases and enquiries
- Ensure all client work is progressed efficiently and that the client is kept informed of the progress
- Exercise high standards of client care in a professional and courteous manner
- Ensure the confidentiality and security of all client documentation and information
- Ensure accurate recording of billing and time monitoring
- Ensure good working relationships with clients and external organisations
- Be active in promoting the services of Benest & Syvret and its brand
- Deal with other tasks as assigned from time to time by the Partners
- Ensure all personal Continuing Professional Development (CPD) is kept up to date

Competencies

- **Building Strong Relationships** - Strive to understand clients, colleagues and key stakeholders, valuing openness and building trust
- **Maintaining Client Relationships** - Strive to develop a detailed understanding of our clients, valuing openness and building trust
- **Communications** - Communicate clearly, concisely, tailoring style and making oneself heard and truly understood in any situation



Technical Competence and Knowledge

- Accounts preparation qualification (AAT Qualifications or equivalent)
- Previous experience in an account's preparation role preferably in an accountancy or law firm
- Previous experience in a time recording role
- Proficient in the use of Microsoft Office Word and Excel
- Excellent written and verbal communication skills
- Self-starter with the ability to learn quickly
- Ability to work with a number of internal and external stakeholders and prioritise workload
- Excellent time management skills

Special Requirements

- The role holder must be willing to show flexibility in working hours in order to provide full/part time cover for other roles during times of annual leave and sickness, and to cover appointments, sometimes at short notice.