

Job Description

Private Law Secretary/Administration Assistant

About Gregg Latchams:

Gregg Latchams offers a comprehensive range of legal services to businesses and individuals based around its Bristol and London offices.

The primary role of Legal Secretary is to provide direct support to their team to enable them to operate at optimum efficiency. This will include but will not be limited to the main responsibilities given below. The legal secretary is expected to use a high degree of self-management and initiative.

Main responsibilities:

- To provide secretarial support including:
 - To prepare correspondence and documents through audio-typing and word processing.
 - To manage filing which will include daily filing and the opening, closing, storage and retrieval of client files in accordance with the defined procedures.
 - To prepare mail and enclosures for despatch.
 - To arrange for all copying and scanning to be undertaken.
 - To make appointments, arrange meetings and to maintain up-to-date diaries.
 - To prepare financial slips and records on files for your team.
- To provide administrative support including:
 - To undertake backlog file closing projects and preparation for storage of files, deeds, wills and securities and ensure that file closing processes are up to date.
 - Manage client AML and general file compliance.
 - To facilitate the file review process and record/report actions and remediation.
 - To update the library resources.
 - Document storage.
 - To support the Tax Manager with trust administration
 - Maintaining files
 - Document storage
 - FATCA/LEI registrations and updates
- To provide support to other secretaries and reception as required.
- To provide guidance to junior and temporary secretaries when required to do so.
- To attend clients, both in person and on the telephone, to provide such support in a professional and friendly manner in keeping with the firm's standards for client care.
- To ensure the confidentiality of all the firm's and clients' documentation and information.

Personal Skills and Attributes:

- A proactive willingness to undertake a role offering secretarial and administrative skills in a professional office.

- Strong interpersonal and client facing skills with ability to communicate effectively at all levels.
- Clear thinking and able to carry out tasks accurately with minimal supervision.
- Self-motivated to complete tasks accurately and quickly, with an ability to prioritise, think laterally and have an eye for detail.
- Ability to work within a team.

Our Expectations:

- To comply with the firm's policies in the carrying out of all duties and assist Directors and Fee Earners in achieving a smooth throughput of work.
- To support the successful development of the firm in line with its overall objectives including client care.
- Participate in marketing activities and cross referral work whether on a firm wide, departmental or office basis.
- Using and assisting in the development of relevant IT and case management systems for your Department.
- To comply with relevant Solicitors Accounts Rules and Solicitors Code of Conduct, along with Money Laundering Regulations and firm/Solicitors Regulation Authority Guidance.
- To identify and meet your job related training and development needs.
- Any other support matters reasonably required by the Directors or your supervisor.

Experience and Qualifications needed:

- Numeracy and literacy skills.
- Knowledge of Microsoft Office Suite (Word, Excel, Outlook, PowerPoint).
- Preferred familiarity of case management systems.
- Legal experience or transferable skill sets.
- Preferable experience of Private Law.