



Job Description

Experienced Private Client Solicitor
Bristol Based

About Gregg Latchams:

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

The company is ambitious and progressive with strong vision and growth strategies and is recognised for its innovative approach to the development of legal practice.

As long established Bristol solicitors, with roots dating back to the 1690s, the company is large enough to be a key player in the marketplace whilst still maintaining a family feeling for employees.

Gregg Latchams is located in the centre of Bristol in Queen Square. The London office is based in Fitzhardinge Street which is a short distance from Oxford Street and within walking distance of Paddington Station.

Gregg Latchams offers exciting opportunities to motivated individuals who share our vision. The company is looking to attract and retain the most talented people in the fields in which it specialises and to create an environment in which they can flourish personally and professionally and progress based on their contribution, commitment and merit.

The GL Bristol Private Client department is comprised of 8 fee earners and 3 support staff and this role will primarily, but not wholly, sit within the probate team. We anticipate that the team will continue to grow to support the business development and our London office. This is either a great development opportunity for a candidate looking to make their move into probate services leadership or for someone already undertaking a similar role and looking for a move to a reputable and successful team.

All of our Private Client team are either full or training members of the Society of Trust and Estate Practitioners and the department holds the WIQS quality standard (the firm as a whole is Lexcel accredited). We will support candidates to further their own personal development as appropriate to the role undertaken.

1.0 About the role

This is an opportunity for an enthusiastic and motivated solicitor with experience of private client matters. It is anticipated that this will be a full time, permanent position based at the GL Bristol office to achieve the following:

- 1.1 to undertake and supervise fee earning work, working both independently and as a member of the team;
- 1.2 to maintain existing relations with the firms clients and assist and help develop new relationships with third party referrers;
- 1.3 managing private client matters, with a particular focus on administration of estates and trusts;

As well as some occasional generalist support to the department including:

- estate planning for asset protection with a focus on tax minimisation, care fees and third party creditors;
 - advising on trusts for pension and life insurance policies;
 - advising on tax matters with emphasis on Inheritance Tax mitigation;
 - advising clients with regard to elderly issues, from LPAs to Deputy Orders;
 - managing relationships with IFAs, accountants and clients.
 - preparation of wills and trusts;
- 1.4 must be willing to work closely with other departments within the firm on joint projects;
 - 1.5 must be willing to participate in the growth and future development of the department, assisting in the build up the client base and marketing the Firm's services.

2.0 Knowledge, skills and experience

2.1 The successful candidate will have:

2.1.1 good "hands on" private client experience in particular with high net worth clients;

2.1.2 excellent client facing skills and the ability to nurture existing clients and third party relationships as well as the ability to help develop new business and assist in networking events;

2.1.3 the ability to prioritise work and to work to strict timescales where required;

2.1.4 technical proficiency and good IT skills including case management systems, Excel and Word;

2.2 It would be desirable for the successful candidate to have:-

2.2.1 experience of advising clients with offshore interests

2.2.2 experience of advising on charitable trust work.

3. Our Expectations

3.1 to comply with the Company's policies in the carrying out of duties and to assist Partners and other fee earners in achieving a smooth throughput of work;

3.2 to support the successful development of the Company in line with its overall objectives including client care;

3.3 participate in marketing activities and actively seek cross referral opportunities and to market the Firm's services;

3.4 use the firms IT and case management systems;

3.5 to achieve agreed financial targets, both in respect of fee income and the recording of chargeable hours;

3.6 to ensure the confidentiality and security of all Company and client documentation and information;

3.7 to maintain high standards in the processing of client work, both in respect of professional standards and client care;

3.8 to maintain good professional working relationships with external institutions and organisations;

3.9 to adhere to agreed Practice procedure as determined from time to time, especially as related to quality standards;

3.10 through training and other means, to keep fully up to date with relevant legislation and practice;

3.11 any other matters reasonably required by the Directors.

Equal opportunities

Gregg Latchams is committed to promoting diversity and inclusion within the firm. The company is committed to tackling all forms of discrimination and ensuring that our staff and everyone that we deal with is treated equally and fairly, and with dignity and respect.

How to apply

If you are interested in applying for this role, please contact Jennifer Bennett in the first instance by emailing hr@gregglatchams.com.