



Walker Foster
Solicitors

Our company Mission is to provide clients with a valued, personal, and reliable service, building lifelong relationships throughout generations.

This is underpinned by our 3 core Values:



Our Values are brought to life through our team behaviours:
The Client and Colleague Charters



PRIVATE CLIENT SOLICITOR/ LEGAL EXECUTIVE/FEE EARNER

Responsible for managing a full caseload of private client fee earning work, in addition to building and maintaining excellent client and third-party referrer relationships and working effectively as part of a team.

MAIN ACCOUNTABILITIES

- Management of all aspects of private client work including will drafting, inheritance tax planning, trust creation and administration, powers of attorney and Court of Protection applications, and probate and estate administration, in accordance with detailed procedures and quality standards, and with the highest standards of client care and professionalism in line with our Client Charter
- Working to agreed levels of billing, time recording, aged debt, and other agreed key performance indicators
- Progression of all client work in a timely and accurate manner, keeping the client regularly informed on progress and on costs
- Maintenance of the confidentiality and security of all documentation and information of the practice and clients, including the use of our case management system
- Responsibility for credit control on own matters, with the guidance and support from the Credit Control/Accounts team
- Compliance with the Solicitors' Accounts Rules and the Solicitors' Code of Conduct
- Positive relationship management with external organisations both individually, and as part of the firm's marketing and business development strategy, to create a strong client base and generate referrals
- Responsibility for personal performance and development, including preparation for/contribution at performance review meetings, and carrying out regular training to keep abreast of changes and developments in the law and to maintain professional competence
- Supervision of the legal assistant through regular interaction and review meetings to discuss performance, development, and wellbeing
- Participation at Departmental Meetings – ensuring key matters of concern are raised for discussion, and that input to the meetings is positive and constructive
- Contribution to a positive working ethos through delivery of Colleague Charters

SKILLS AND CAPABILITIES

- **Verbal communication:** The ability to listen to clients and colleagues and respond in an approachable, respectful, and professional manner
- **Written communication:** The ability to communicate clearly, concisely and with accurate grammar and punctuation, in a tone which upholds the professional image and brand of Walker Foster
- **Organisational ability:** The ability to own and prioritise tasks and to use your time and resources effectively and efficiently
- **Strong IT proficiency:** Including use of Microsoft Office applications and our case management system, Proclaim
- **Teamwork:** The ability to treat colleagues with respect, and to be supportive and positive in the workplace in order to contribute to a friendly working atmosphere