**PRIVATE CLIENT PARALEGAL**

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| **Job Title** | Private Client Paralegal |
| **Jobholder** | New post |
| **Salary Scale**  | Competitive |
| **Working Pattern** | 9am – 5pm, Monday to Friday with one hour for lunch |
| **Reports To** | Senior Executry Paralegal  |
| **Job Purpose** | To administer and manage a caseload of executry files independently within a team of Executry Paralegals.  |
| **Management Responsibility for** | None  |

**Main Duties and Responsibilities**

* Administer testate and intestate executries from initial meeting to conclusion
* Proactively manage your own caseload and provide an excellent client service
* Communicate with Executors and other third parties as required
* Identify and resolve any problems experienced by our clients in a professional manner
* Demonstrate a good working knowledge of inheritance tax exemptions and reliefs, and be able to produce inheritance tax calculations
* Complete HMRC inheritance tax forms
* Prepare Executry accounts
* Knowledge of legal rights including calculations and experience of the issues that can arise with such claims.
* Build good relationships internally and advise colleagues with different specialisms
* Adhere to firm processes in relation to financial policies, time recording and AML compliance
* Maintain accurate records on the firm’s document management system.

**Skills, Knowledge and Experience**

* Relevant formal qualification(s), preferably as recognised by the Law Society of Scotland Accredited Paralegal scheme
* At least 5 years’ previous experience dealing with executries is essential
* A commercial focus in managing workload effectively and efficiently
* Excellent interpersonal skills, both written and oral
* Able to build professional relationships with clients and third parties
* Good organisational skills and the ability to prioritise tasks
* A high level of accuracy and strong attention to detail
* Ability to work independently as well as part of a team, delegating to and supporting colleagues
* Good working knowledge of Microsoft Office applications.

If you wish to apply for this role, please send your CV via e-mail to recruitment@murraybeith.co.uk