

**CARTMELL SHEPHERD PRIVATE CLIENT SOLICITOR
PERSON SPECIFICATION**

Attributes	Essential Criteria	Desirable Criteria
<p align="center">Education & Qualifications</p>	<ul style="list-style-type: none"> • Qualified to degree or CILEX level • Must hold a current SRA Practising Certificate • IT competent – must be familiar with MS Office package focussing on MS Word and Outlook • Must be able to confirm competence through CPD • STEP qualified 	
<p align="center">Experience</p>	<ul style="list-style-type: none"> • Broad base of Private Client experience including: <ul style="list-style-type: none"> ○ Drawing up and amending Wills ○ Probate and Estate administration ○ Powers of Attorney ○ Court of Protection ○ Tax and estate planning • Experience of managing, administering Trusts and acting for Trustees including: <ul style="list-style-type: none"> ○ Knowledge of obligations and duties of trustees ○ Experience in using trusts to minimise taxes and preserve assets ○ Up to date knowledge of the Revenue's reporting procedures for trusts ○ Experience of dealing with trust disputes ○ Knowledge and experience of dealing with charitable and disabled trusts ○ Knowledge of means tested benefits ○ Experience in advising high net worth individuals and those involved in businesses • Ability to manage matters from the outset to closure • Proven track record of delivering client satisfaction 	<ul style="list-style-type: none"> • An ability to follow or create precedent documents and operate case management pathways when required to do so • Experience of using Proclaim case management software

Attributes	Essential Criteria	Desirable Criteria
	<ul style="list-style-type: none"> • Be able to work to appropriate targets and objectives • Have an ability to understand clients' needs and communicate in a manner that clients understand 	
Aptitudes	<ul style="list-style-type: none"> • Well organised, able to prioritise and manage time effectively • Dynamic, innovative and adaptable approach to all tasks • Self-directed and motivated • Work well in a team and with a wide range of people • Be an excellent communicator • Be proactive and able to take the initiative • Be persuasive and diplomatic • Possess a good level of business awareness • Be able to market the firm to third parties and introducers requiring a suitable level of social confidence, awareness and a passion for business development in your area of expertise • Be well presented with a professional manner • Committed to the business, demonstrating 'staying power' • Must have experience in working to tight and challenging deadlines 	<ul style="list-style-type: none"> • Sense of humour • Energy and enthusiasm
Other requirements	<ul style="list-style-type: none"> • Respond well to pressure • Excellent written and verbal communication skills • Interest in being involved in the wider activities of Cartmell Shepherd • Commitment to equality and diversity • Full UK driving licence 	

Practice Manager

July 2020