



**WILLS & PROBATE
ASSOCIATE
SOLICITOR**

East Lancashire



**WOODCOCKS
HAWORTH
& NUTTALL**

JOB DESCRIPTION



At WHN Solicitors, we believe that our people are the core of our success. We pride ourselves on providing exceptional legal services with a human touch. Over the past five years, we have developed this culture and grown with 110 colleagues across nine locations. We are nationally recognised as leaders of our field in Legal 500 and Chambers & Partners.

We are proud to be accredited as an 'Employer of Choice' which demonstrates our positive approach to career development, culture, staff engagement, leadership, diversity, inclusion and work life balance.

Join our dynamic and forward-thinking law firm. With an impressive portfolio of clients and a reputation for excellence and client satisfaction, we provide a challenging yet rewarding environment. We are committed to fostering growth, innovation, and career development within our practice.



The Role

We are seeking a client focussed and enthusiastic Wills and Probate Associate Solicitor to join us in East Lancashire. The role involves regular travel between WHN offices, to local events and to clients' homes. This is a fantastic opportunity for an individual looking to join a forward thinking and successful firm.

The successful candidate will advise and guide clients expertly and compassionately on all matters regarding wills, probate and estate planning.



www.whnsolicitors.co.uk

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Principal Responsibilities

Drafting and Reviewing Legal Documents:

- **Drafting Wills:** Create wills that accurately reflect the client's wishes regarding the distribution of their estate, guardianship of minor children, and other personal directives.
- **Drafting Complex Wills:** Incorporating, discretionary and life interest trusts and dealing with businesses and farms.
- **Powers of Attorney:** Prepare lasting powers of attorney (LPA) for property and financial affairs, as well as health and welfare, ensuring clients' preferences are legally documented.
- **Reviewing Documents:** Examine existing wills, trusts, and other legal documents to ensure they are up-to-date and comply with current laws and the client's intentions.

Estate Administration:

- **Applying for Probate:** Handle the process of applying for a grant of probate or letters of administration, which gives the legal authority to manage the deceased's estate.
- **Asset Collection and Distribution:** Identify, collect, and value the deceased's assets, pay any outstanding debts and taxes, and distribute the remaining assets to the beneficiaries as per the will or intestacy rules.
- **Tax Compliance:** Ensure all necessary tax returns are filed, including inheritance tax, income tax, and capital gains tax, and that any tax liabilities are settled.
- **Record Keeping:** Maintain accurate and detailed records of all transactions and communications related to the estate administration process.
- **Implementing Trusts created in a Will:** registering the trust following death and drafting any related documentation such as Deeds of Appointment.

Client Consultation and Advice:

- **Initial Consultations:** Meet with clients to understand their needs and objectives, providing tailored advice on estate planning, will drafting, and trust creation.
- **Ongoing Advice:** Offer continuous support and guidance to clients, addressing any questions or concerns they may have throughout the process.
- **Inheritance Tax Planning:** Advise clients on strategies to minimize inheritance tax liabilities, such as making lifetime gifts, setting up trusts, and utilising available reliefs and exemptions including advising and preparing Deeds of Variation following a death.
- **Sensitive Communication:** Handle discussions with empathy and sensitivity, especially when dealing with bereaved clients or complex family dynamics.
- **Development of others:** Contribute to the development of colleagues who are less experienced including paralegals, trainees, apprentices and administrative colleagues.
- **Effective time management:** Manage your time effectively ensuring time recording is accurate to generate appropriate fees whilst maintaining high standards of client care.
- **Work diligently complying with the professional standards as defined in the Office Manual and by the SRA, Lexcel, the CQS and the Legal Aid Agency.** Ensure all information regarding the firm, its clients and their business is kept strictly confidential.
- **Wherever possible, utilise available software to provide a quality, cost effective and efficient service to clients**
- **Take responsibility including proactively participating in activities to ensure your personal development is maintained including keeping up to date with the changes in the area of law in which you practice.**
- **Understand the firms marketing strategy, contribute to business development initiatives, including networking and attend and positively represent the firm at industry events when appropriate.**
- **Any other such duties that will assist in the growth and development of the department/firm to support the effective operation of the business.**

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Competencies required for the role

EXCELLENCE

Acts as a professional at all times remembering to represent the reputation of yourself, clients and the firm.

INNOVATION

Constantly aims to provide the highest quality in everything we do and embraces modern working practices.

INTEGRITY

Acts honestly and fairly displaying core values, is accountable and looks for positive solutions.

CLIENT FOCUSED

Acts in the clients' best interests ensuring that we go the extra miles to ensure 100% satisfaction.

INCLUSIVITY

Working with colleagues, clients and partners to form a seamless team.

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Person Specification

		Essential	Desirable
QUALIFICATIONS	Qualified Solicitor 4+PQE - current Practising Certificate or Legal Executive 4+ years experience	✓	
	Membership of STEP (Society of Trust & Estate Practitioners)		✓
EXPERIENCE & KNOWLEDGE	Experience of wills drafting, establishing various types of trust, preparing LPA's and estate administration	✓	
	Microsoft applications	✓	
	Case Management systems (preferably Proclaim)	✓	
	Understand the value of diversity		✓
	Knowledge and experience of health and safety		✓
SKILLS	Strong negotiation, drafting and analytical skills	✓	
	Excellent client and colleague management and communication skills with the ability to build and maintain long-term relationships	✓	
	Proven leadership and team management capabilities	✓	

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Person Specification Contd.

		Essential	Desirable
	Proactive, with a commercial mindset and the ability to think strategically	✓	
	Strong organisational skills and the ability to manage multiple priorities in a fast-paced environment	✓	
	Pro-actively work on own initiative with the ability to know when to escalate matters	✓	
	Communicate in a sensitive, clear and unambiguous manner	✓	
	Demonstrate resilience when problem solving	✓	
PERSONAL VALUES	Enthusiasm for and commitment to the work we do	✓	
	Ambitious with strong desire to learn	✓	
	Acts with fairness, honesty and trustworthy in all dealings	✓	
	A commitment to professional development and staying current with legal developments	✓	
	Full driving licence		✓



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What We Offer

- Competitive salary
- Auto enrolment pension
- Death in service (after qualifying period)
- Salary sacrifice private medical insurance scheme
- Employee Assistance Programme
- Enhanced maternity / paternity / shared parental policies
- Legal services
- Conveyancing fees
- Opportunities for career progression and professional development.
- A supportive and inclusive work environment.

How to Apply

If you are a dedicated and ambitious solicitor with a passion for working in wills and probate, we would love to hear from you.

Please submit your CV and a cover letter outlining your experience and suitability for the role to jobs@whnsolicitors.co.uk

We are an equal opportunities employer and welcome applications from all suitably qualified persons regardless of their race, sex, disability, religion/belief, sexual orientation, or age.

For any inquiries regarding the role, please contact Kay Jackson Leigh at kay.jackson-leigh@whnsolicitors.co.uk or 0161 761 8093