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Job Description

Job Title

Administration Assistant

Location

Dewsbury Office

Reports to

Deputy Head – Private Client

Responsible to

Managing Director

Job Purpose

The Administration Assistant provides comprehensive administrative support to the Private Client team, ensuring the efficient management of client documentation, office administration, reception support and day-to-day operational activities. The role is central to delivering an excellent client experience while maintaining the firm's high standards of quality, compliance and professionalism.

The postholder will demonstrate the firm's CREATE values of **Community, Respect, Evolve, Approachable, Teamwork and Endeavour** in all aspects of their work.

Key Responsibilities

Administrative Support

Provide administrative assistance to the Private Client Department, including:

- Scanning and securely storing original documents, including Wills, Lasting Powers of Attorney (LPAs) and deeds.
- Maintaining accurate records within the firm's document management and Will Bank systems.
- Preparing, printing and collating correspondence and legal documentation.
- Preparing documents in readiness for client appointments.
- Requesting and processing cheque requisitions in accordance with firm procedures.
- Certifying and copying legal documents.
- Preparing receipts for the collection of original documents and keys.
- Contacting clients to advise when original documents are ready for collection.
- Monitoring fee earners' diaries to support the preparation of appointments.

File and Document Management

- Open, maintain, close and archive client files in accordance with firm procedures.
- Retrieve original documents from archive storage and accurately record all movements within the firm's systems.
- Maintain accurate filing of both electronic and paper records.
- Ensure client documentation is stored securely and in compliance with the firm's confidentiality and data protection requirements.
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Financial Administration

Assist with routine financial administration, including:

- Processing petty cash transactions.
- Preparing cheque requests.
- Assisting with invoices and other financial documentation.
- Banking cash and cheques received at the Dewsbury office in accordance with firm procedures.

Client and Office Support

- Handle incoming and outgoing post on a daily basis.
- Undertake photocopying, scanning, document bundling and data entry.
- Answer telephone calls professionally, taking accurate messages and directing enquiries appropriately.
- Arrange appointments and maintain fee earners' diaries where required.
- Communicate professionally with clients, courts, third parties and other stakeholders.

Reception Cover

Provide reception cover as required by:

- Welcoming clients and visitors in a friendly, professional and approachable manner.
- Notifying colleagues promptly of client arrivals.
- Managing the visitor signing-in system in accordance with health and safety and fire procedures.
- Maintaining a positive first impression of the firm.

Office Administration

Support the smooth running of the Dewsbury office by:

- Monitoring meeting room bookings and highlighting any scheduling or office space issues.
- Assisting in maintaining a safe, clean and welcoming office environment.
- Reporting maintenance or health and safety concerns and following these through to resolution where appropriate.
- Monitoring stationery, office supplies and refreshments, arranging replenishment as required.

Compliance and Quality

- Comply with all office procedures and policies.
- Maintain confidentiality of client and firm information at all times.
- Ensure compliance with GDPR, Lexcel standards and other regulatory requirements.
- Maintain accurate records using the firm's case management systems.
- Contribute to continuous improvement within the department.

General Responsibilities

- Demonstrate the firm's CREATE values in all interactions.
- Participate in training and continuous professional development.
- Support colleagues across the business as required.
- Undertake any other duties appropriate to the level of the role.
- Work collaboratively to ensure departmental objectives are achieved.
- Contribute to maintaining a positive, professional and supportive working environment.

Person Specification

Essential

- Excellent organisational and administrative skills.
- Strong attention to detail and accuracy.
- Good written and verbal communication skills.
- Excellent customer service skills.
- Proficient in Microsoft Office and the ability to learn new systems.
- Ability to prioritise workload and manage competing deadlines.
- Professional, approachable and adaptable.
- Ability to work both independently and as part of a team.
- Commitment to maintaining confidentiality and professionalism.

Desirable

- Previous administrative experience within a legal or professional services environment.
- Experience of Private Client work.
- Knowledge of Actionstep or a similar case management system.
- Understanding of document management and archiving procedures.

Core Competencies

The successful candidate will consistently demonstrate the firm's CREATE values:

- **Community** – Supporting colleagues and contributing positively to the firm.
- **Respect** – Treating clients and colleagues with professionalism and courtesy.
- **Evolve** – Being open to learning, development and continuous improvement.
- **Approachable** – Providing a welcoming and helpful service.
- **Teamwork** – Working collaboratively across departments.
- **Endeavour** – Taking ownership and delivering high-quality work.

This job description outlines the principal responsibilities of the role. It is not intended to be an exhaustive list, and the postholder may be required to undertake other duties that are commensurate with the nature and level of the position to meet the needs of the business.