

# TaitsLegal

## Position Description

### Administrative Assistant – Estate Planning / Wills / Probate

#### **Key Responsibilities**

To work as assistant with one or a number of operators as required to:

- enable the operator to concentrate his/her efforts in the areas requiring his/her legal and general expertise;
- assist operator to achieve his/her budget, collection of debts and general file management;
- maintain friendly and efficient client liaison;
- act independently when required with clients or on file matters;
- prompt operator as appropriate with regard to client, file and other internal office matters.

The role requires the assistant to project a positive, efficient and friendly image to clients as we strive to provide quality client service.

The above key responsibility will be supported by the following duties:

#### **Duties include:**

- Filing on a daily basis of all relevant correspondence
- Audio typing, editing and printing of documents
- Preparing/amending overviews on all matters
- Collating letters and enclosures
- Telephone - dealing with incoming and outgoing calls
- Making of appointments for operator(s)
- Opening and preparing new files
- Organizing entering of documents into safe custody system
- Photocopying, sending facsimiles, requesting cheques, handling receipts, and other administrative tasks as appropriate
- Calling debtors as requested by operator
- Preparing Wills or Powers of Attorney for drafting as requested by operator
- Preparing Trust documents for drafting as requested by operator
- Preparing Probate documents for drafting as requested by operator
- Accounts
- Letters to executors, beneficiaries, banks, nursing homes etc.
- Preparing Trust Statements
- Conducting title searches (Australian Securities Commission company searches, business name searches etc.) if required
- Conducting PEXA workspaces for transmission applications (if required)

#### **General requirements and expectations:**

- Actively participate in developing office procedures and methods, and provide positive input into the work place environment
- Act in a leadership role within the office and encourage a positive outlook and approach with partners and staff
- Co-ordinate and contribute to the effective running of meetings
- Attend scheduled meetings
- Assist in other office duties as required from time to time, e.g. relieving at reception, organizing functions, deliveries.