

Estate Planner / Will writer

Kinherit – www.kinherit.co.uk

We're a law firm specialising in Wills, Trusts, Lasting Powers of Attorney and Estate Planning. We combine quality advice with unique technology to better protect families when their loved ones die. We've solved the problem of how best to hand over instructions and inheritance to the next generation, avoiding the distress so often experienced during probate

Experience / Qualifications

This role would suit someone who is currently or has experience as a Will Writer, who is looking for the next step in their legal career (you would be responsible for your own client base).

Required

- Graduate in a regulated profession such as Law or Accountancy and Finance, having attained a minimum of a high 2:1, or a diploma in financial services
- Relevant experience in Will Writing and Estate Planning.
- Confidence in speaking to clients over the telephone and virtually over Zoom/Teams
- A proven track record in attaining academic, career and personal development
- Strong attention to detail
- Fantastic communication skills

Desirable

- Society of Trust and Estate Practitioners (STEP) membership/qualifications would be advantageous but not essential
- Will Writing and/or Estate Planning experience
- Experience working in a law firm/solicitors firm is advantageous
- Experience providing clients with high levels of service
- Retail, hospitality experience
- Sales and customer service experience
- Experience with managing own client base
- Having completed the Legal Practice Course or SQE would be advantageous but not essential

Attributes

- Excellent verbal and written communication skills, and ability to engage with clients on the phone and over Zoom
- Ability to analyse the needs of clients and advise and recommend accordingly
- Excellent attention to detail, both verbal and written
- Able to manage and liaise with multiple clients and introducers at different stages of the process
- Ability to handle sensitive information with the utmost discretion
- Ability to work as a team and independently
- Ability to use Microsoft Word, Excel and other IT systems and quick to pick up new systems
- Ability to efficiently manage workload and client files
- Willingness to learn and expand knowledge

Package

- Salary based on STEP qualifications and experience and £25,918 - £44,982+ pro-rata
- Discretionary bonus
- Funded and supported professional STEP qualifications
- 25 days holiday plus 24 & 31 December, and statutory bank holidays
- Pension
- Working hours full-time 37.5 hours per week
- Flexible working policy including optional WFH
- Complimentary Will and End-of-Life planning
- Up to 30% discount for immediate family Wills and End-of-Life planning
- Critical illness insurance
- Income protection
- Death in service

Business Summary

Our mission is to 'Redefine End-of-Life Planning'.

Our qualified Estate Planners help make sense of a whole range of legal and financial issues, creating a Will that makes sure our clients' wealth, where possible, goes exactly where they want it to. The Will industry isn't regulated, which means the quality of advice can be low. Every Kinherit adviser qualifies with the Society of Trust & Estate Practitioners (STEP), so we'll always give the best advice available.

Role summary

This role would suit someone who is currently or has experience as a Will Writer, who is looking for the next step in their legal career (you would be responsible for your own client base).

The ideal person would have ambitions to use their experience and knowledge gained in previous employment, and quickly apply that knowledge to support clients directly.

We take your natural talent and support you to attain your Society of Trust and Estate Practitioners (STEP) qualifications, but the development does not stop there. Our Estate Planners are supported with their personal development from STEP Affiliate, to STEP Associate, through to full TEP, being promoted throughout the journey.

The day-to-day role of a Kinherit Estate Planner is to guide our clients through the process of establishing effective end-of-life plans, which protect beneficiaries from losing assets and their estate. This is achieved through producing Wills, Trusts, Powers of Attorney and other relevant documentation.

Role description

As a Kinherit Estate Planner, your role is to analyse our clients' estates to produce accurate recommendations and documentation, plus gain the information to support our full handover service on death. This, in turn, protects our clients' money on death, whilst also saving their executors' time by removing any undue hassle.

Estate Planners are assigned Introducers (Third Party Professional companies) who pass potential clients to Kinherit. This is the Account Management aspect of the role. Estate Planners influence the volume and quality of clients from their Introducers, so it is crucial to build and maintain professional relationships.

As an Estate Planner, you provide an advice-led service, being an expert in all aspects of estate planning. Often this results in additional documents being produced, such as Legal Powers of Attorney, Trusts, Business Trusts and Deeds of Severance. Following on from this process, you support Clients in our revolutionary handover service using our Kinvault.

Career progression is crucial, we support all employees to gain the experience they need for their next step. If you want to gain promotion and become a Senior Estate Planner we will give you the skills and experience you need.