

Trainee 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 has recently completed a law degree and wants to gain legal experience in Estate Planning/Will Writing and kick-start their start of their career.

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
- 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 but not essential

- Will Writing and/or Estate Planning experience
- Experience working in a law firm/solicitors firm is advantageous
- Experience in customer service
- Retail, hospitality experience
- Sales and customer service experience

Attributes

- Excellent verbal and written communication skills, and ability to engage with clients on the phone and over Zoom
- Ability to accurately record relevant information during client meetings
- 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 qualifications and experience (£24,695 - £27,203+ pro-rata)
- Discretionary bonus
- Funded and supported professional STEP qualifications
- Promotion to Estate Planner once STEP Affiliate
- 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 has an interest in becoming an Estate Planner/Will Writer. As a Trainee Estate Planner, you would be working towards becoming a STEP Affiliate (company-funded) with the aim of being promoted to an Estate Planner.

The ideal person would have ambitions to use their knowledge gained at university or 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 and Trainee 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 Trainee Estate Planner is to guide our clients through the first stage of the process of establishing effective end-of-life plans, which protect beneficiaries from losing assets and their estate. This is achieved through conducting initial client meetings and assisting Estate Planners with client files, to assist with your progression to Estate Planner.

Role description

As a Kinherit Trainee Estate Planner, your role is to carry out initial client meetings and record relevant information, and you will help clients understand the options available to them and their situation in readiness for their meeting with the Estate Planner. You will be working closely with the Estate Planning Team and will gradually take on more responsibilities in the process to help prepare for your transition to Estate Planner. You will be helping clients 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.

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

Career progression is crucial, we support all employees to gain the experience they need for their next step. If you want to gain the qualifications and experience to receive a promotion and become an Estate Planner, and then a Senior Estate Planner, this is the perfect role for you.