

Probate Executive – Private Client Department

Job Purpose:

We have an opportunity for a Probate Executive to join Gepp Solicitors' Private Client Department as part of the dynamic and growing tax team.

The role has arisen due to the expansion of the team to accommodate a growing workload.

The successful candidate will have the opportunity to work within a team with a reputation for providing excellent client care and high-quality advice. The role is a hybrid one with the ability to work from home as well as in our modern, first-class office.

Gepp Solicitors is a leading law firm, based in Chelmsford, with a well-established, growing client base in Essex, London and further afield. The firm has a reputation for consistently delivering excellent client service. This is reflected in a ReviewSolicitors rating of 4.9/5.0, supported by over 1,300 reviews.

Responsibilities and Duties:

- Drafting inheritance tax and probate application forms, to include preparing inheritance tax calculations.
- Meeting with personal representatives to explain the process of dealing with an estate.
- Drafting emails and letters to clients and third parties.
- Assembling documents and papers for making probate applications, both online and paper based where applicable.
- Assisting with the estate administration process, including collecting assets, agreeing the estate's tax position and paying liabilities.
- Liaising with HMRC, HMCTS and third parties, as required.
- Comfortable with liaising with clients and third parties but identifies and refers any technical queries to Partners within the Department.
- Production of estate accounts.
- Liaising with the personal representatives and beneficiaries in relation to estate distributions, including providing forms R185 where required.

Personal Specification:

The successful candidate should have:

- A basic understanding of inheritance tax, income tax and capital gains tax and the probate process.
- Prior experience of using MyHMCTS for online probate applications is desirable, but training can be provided.
- Experience of preparing estate accounts desirable.
- Ability to work within a team with minimal supervision but with the knowledge that support is available from all levels in the team where needed.
- Conscientious and careful with a keen eye for detail.
- Organised, keeps track of deadlines and follows up on correspondence, when required.
- Experience of using MS Office, especially Excel and Word.
- Shows initiative and seeks help with any potential issues identified.
- Motivated and with a positive outlook and willingness to learn and develop.

Salary and Benefits

- Competitive salary
- Life assurance (4 x annual salary)
- Income protection
- Health cash plan, which offers discounted gym membership and many other benefits
- Employee assistance programme
- Free car parking
- 25 days holiday in addition to public holidays
- Monthly staff lottery

We are committed to recruiting individuals on merits of suitability for each role, on the basis of qualifications and experience. All applications are treated fairly and equally regardless of sexual orientation, race, disability, religious beliefs and any other protected characteristic, ensuring that there are equal opportunities at all stages of the recruitment process.

Please submit your CV (maximum double sided) to Megan Johnson, HR Assistant at recruitment@gepp.co.uk