

Job Description	
Job title: Wills Database Administrator	Contract type: 6 month fixed term contract
Hours of work: Full Time (37.5 hours per week)	Location: Birmingham
Purpose of the role: To produce letters to clients asking for their instructions as to storage or returning of the wills acquired from Challinors and deal with the internal administrative tasks necessary to record and implement the clients' instructions. Please note that this role has no direct client contact as all letters will be sent out in a fee-earner's name and all enquiries will be fielded by the Wills & Deeds Co-ordinator or others in the Private Client team in Birmingham. As a result this 'back office' role will work closely with the Wills & Deeds Co-ordinator and the Private Client team in Birmingham.	
Direct report to: Janis Law, Director of Knowledge and Best Practice	
Main duties and responsibilities: Produce and send standard letters to clients for whom we are holding wills acquired from Challinors: This involves: <ul style="list-style-type: none"> ▪ Reviewing the will to check the name and address against the information in the wills database and updating an excel spreadsheet accordingly ▪ Identifying whether the will contains an executor from Challinors or a related practice and recording this in an excel spreadsheet ▪ Locating postcodes or checking whether the client's address is still current using 192.com ▪ Using mailmerge to produce the letters to the client; ensuring that at least 250 letters go out each week. Printing, collating and sending those letters. ▪ Recording responses in an Excel spreadsheet; sending reminder letters Create first drafts of codicils. This involves: <ul style="list-style-type: none"> ▪ Recording, in an Excel spreadsheet, information received from the client and taken from the will ▪ Using mailmerge to create the codicil and related letters for review by a solicitor or paralegal; making any amendments to the documents that may be required ▪ When approved, collating the letters and documents for despatch to the client ▪ Related administration: <ul style="list-style-type: none"> ▪ opening a file on our Elite financial system; ▪ Entering data about the completed will and codicil in the CW wills database 	

Managing the process for requesting original documents from the Administrator of Challinors

- Recording which clients ask for their deeds to be retrieved from the Administrator
- Compiling a schedule of these clients (using an Excel spreadsheet) and sending to the Administrator
- Checking that deeds are received from the Administrator and chasing as appropriate
- Notifying the client when their deeds have been received by us
- Sending the deeds to storage

Assisting the Wills & Deeds Co-Ordinator with administrative tasks such as:

- Entering information about archived wills into the CW wills database
- Sending retained wills to archive
- Updating the original Challinors Wills databases

Personal Specification

- Has excellent IT skills including Excel and Word (particularly mailmerge)
- Is IT literate i.e. able to quickly learn other software packages such as iManage, Elite and InterAction. Prior experience of these would be useful but not essential
- Has strong organizational abilities
- Works quickly but with accuracy and excellent attention to detail
- Able to work with minimum of supervision
- Comfortable working to deadlines and meeting agreed targets
- Demonstrates a proactive and organised approach to work; works efficiently
- Has well developed communication skills, both written and oral
- Acts with tact and diplomacy at all times and maintains confidentiality
- Experience of working in a legal environment and of producing legal documents for any legal discipline (but particularly private client work) would be an advantage