JOB SPECIFICATION:

Probate, Estates and Trust Senior

Name:		**Effective from:**	
Department:	Probate and Tax (Ely office) (Can consider Bury St Edmunds office)		
Job Title:	Probate, Estates and Trust Senior		
Reports To:			
Direct Reports:			
Hours / Days:	9.00 am to 5.30 pm	Monday to Friday	
Job Summary:	To primarily assist the Probate department in the provision of high-quality services for a range of probates, estate and trust clients. Including preparation of self-assessment tax returns and accounts for trusts and estates. Previous experience in dealing with the Probate process in a professional environment is required. Study support for relevant professional qualifications (e.g., such as ATT, STEP).		

Key Activities and Responsibilities:

1. **Probate and Estates**
   - Preparation of draft IHT400 forms, or equivalent, where required to progress an application for grant of probate.
   - Dealing with a Probate and estate administration caseload from instruction to completion, which will involve identifying assets (e.g., properties, bank accounts and investments etc…) and liabilities as at the date of death, including obtaining/ascertaining associated values.
   - Preparation of probate papers for an application of grant
   - Capturing estate information on relevant software to produce forms and computations.
   - Drafting of estate accounts
   - Provision of assistance to non-probate staff.
   - Liasing and communication with both internal colleagues, executors, trustees and other professionals, as required, including attendance at meetings, as and when required.
   - Identifying cross selling and tax advisory/planning opportunities (e.g., beneficiary tax/distribution planning or ‘Deed of Variations’, for example).

2. **Trust and Estates Tax**
   - As required, preparation and, dependent upon experience, some review of self-assessment tax returns to include capital gains computations and preparation of schedules of income from property.
   - Preparation and submission of 60-day CGT returns.
   - Capturing tax return information on to tax software to produce returns and calculations.
   - If required and dependent upon experience, monitor ten-year anniversary of trusts.
   - If required and dependent upon experience, preparation of forms IHT100 for trusts.

- Registration of trusts and estates on the HMRC TRS
- Estate tax return preparation, or informal reporting to HMRC.
- Communicate directly with HMRC where necessary.

3. Client Management

- Opportunity to be responsible for some direct contact for probates/estates/trust clients.
- Manage and develop client relationships, including client contact by telephone, meetings and electronically.
- Build and maintain strong relationships with clients.
- Drafting of bills on a timely basis, for approval by the client Associate or Partner.

4. General

- Liaise with and support work of other colleagues, as required.
- Undertake appropriate training to ensure CPD criteria are met.
- Undertake general administration tasks.
- Effectively communicate with colleagues within the organisation to promote teamwork across the group and assist in the development of internal relationships.
- Identify and meet personal job-related training as required.
- Provide assistance in terms of general and specific support to Partners, associates and managers, as required.
- Undertake other reasonable work activities as determined by the Partners, associates and managers.