

**JOB DESCRIPTION**  
**Conveyancing Assistant – PMPL**

<b>Job Title:</b>	Conveyancing Assistant – PMPL
<b>Location:</b>	Sheffield
<b>Reports to:</b>	Head of Private Client / Conveyancing Management
<b>Standard Hours of Work:</b>	35 hours per week (some flexibility may be required in relation to start / finish times)
<b>Date:</b>	07 April 2017

**1. JOB PURPOSE**

To provide administration and assistance to a Conveyancing Property Lawyer and Team in relation to the progression of active conveyancing files within the Private Client Department. To carry out further ad hoc duties as required by the management

**2. SCOPE OF THE ROLE**

This role will be based in Sheffield reporting to the Head of Private Client / Conveyancing Management. The first line of management will be your Property Lawyer

**3. PRINCIPAL ACCOUNTABILITIES/TASKS**

- Contacting clients, Agents, Referrers, Search providers and other parties solicitors to progress active conveyancing transactions
- Requesting Documentation fundamental to the transaction
- Ensuring documents are returned by clients and work providers, chasing them if required and progressing transactions
- Dealing with sale, purchase and remortgage matters to the extent delegated by the fee earner to include:
  - Any preliminary matters on both sale and purchase files
  - Obtaining all required documentation from the client, other-side, third parties (such as HMLR, HMRC, Lenders)
  - Drafting sale contracts and remortgage documentation as required by the Property Lawyer
  - Dealing with Lenders on both sale and purchase matters, checking redemption statements, mortgage offers and dealing with the financial calculations pertaining to the same as required by the Property lawyer
  - Dealing with sale matters from inception to completion (subject to appropriate training and sign off from the Property Lawyer)

- Dealing with remortgage matters from inception to completion (subject to appropriate training and sign off from the Property Lawyer)
- Assisting with purchase files including:
  - Obtaining initial documentation
  - Collating contract packs
  - Administrative duties pertaining to the title checks / title reports
  - Assisting the Property Lawyer in raising enquiries
  - Drafting TR1, TA13, Share Transfers, Statutory Declarations and other appropriate transactional documentation
  - Reviewing and reporting on mortgages
  - Ordering (all appropriate) searches and review and report on the same as appropriate as directed by the Property Lawyer
  - Dealing with any enquiries raised / answered as directed by the Property Lawyer
- Preparation of files for completion to include, final searches, requests for mortgage advances and liaison with clients as to receipt of balance funds.
- Completion administration on files to include checking files prior to exchange that all documentation is received and signed correctly prior to sign off for exchange, doing COT's, ensuring all accounts slips are processed including CTO's and referral fee write offs and that all letters are done on the day of completion.
- Dealing with all appropriate Notices / Deeds – post completion
- Ensuring the timely transfer of files following completion to the post completion team.
- Updating of referrer, agent and other websites and portals
- To check Conveyancing Inbox daily as appropriate and deal with any emails relating to current files
- Clearing daily task list in Proclaim
- Telephone enquiries as received into the office
- Chaser calls as required in relation to redemptions, completion dates and search results.
- This list is not exhaustive and other tasks may be requested by the Property Lawyer / Management

# **PERSON SPECIFICATION**

## **Conveyancing Assistant – Private Client**

### **1 PERSON SPECIFICATION**

- Ability to work to deadlines
- Computer literate and good typing skills
- Must be able to deal with financial information
- Ability to prioritise work loads
- Willingness to adhere to and surpass set targets
- Ability to work on own initiative and as part of a team
- Excellent telephone manner, client care and enthusiasm
- Must be able to communicate well both orally and in writing

### **2 EXPERIENCE**

- Essential Typing skills / Case Management Skills
- Previous experience of working in a busy Residential Conveyancing department
- Experience of telephone work and working in a client care environment

### **3 TECHNICAL SKILLS/QUALIFICATIONS**

- Good standard of education essential (minimum of 5 GCSE's)
- Working towards or willing to work towards a recognised qualification (ie CILEX or CLC)
- Good standard of spoken and written English required.
- Competent use of MS Office required
- Use of Case Management System
- Understanding of email systems, portals and other IT as appropriate