

JOB DESCRIPTION

Job Title: Lasting Powers of Attorney (LPA) & Will Writer

Responsible for: Volunteers

Accountable to: Head of Information

Location: Age Well Centre, Leicester City

Job Purpose:

Age UK Leicester Shire & Rutland offers a wide range of over thirty services to support older people. We are expanding our services by offering a brand-new LPA (Lasting Power of Attorney) and Will Writing service.

This is a prime opportunity for a self-starter seeking a role where there is scope to help develop and grow a new business, whilst knowing all profits go directly towards helping older people in need.

As an LPA & Will Writer, you will be responsible for assisting clients in the creation of straightforward Wills, Living Wills and Lasting Powers of Attorney.

You will work with clients and their families face to face, online or over the telephone. You will provide excellent customer service to ensure clients wishes are accurately documented and legally sound, collating the information needed to craft the appropriate legal documents from start to finish.

Duties and Responsibilities

1. To work competently and compliantly within the limits of authority.
2. Plan and manage own workload to meet targets and take a proactive role in promoting and growing the service.
3. Accurately complete all administration and documentation in accordance service and regulatory standards and procedures. Excellent written and verbal communication skills are essential.
4. Provide a high level of customer service, including keeping accurate records, resolving issues promptly and keeping clients updated. Refer any complaints to your line manager.
5. Ensure clients are dealt with using empathy, patience and a client-focused approach, upholding a high level of professionalism.
6. Provide the service in person, by phone and online, travelling to client's homes as required.

7. Maintain a vigilant approach to safeguarding, fraud, coercion and mental capacity.
8. Promote other services and products, signposting and referring on to other services as appropriate and with consent.
9. Plan, prioritise and monitor multiple on-going applications collating additional information promptly.
10. Establish and maintain positive working relationships with clients, their families and carers, as well as with internal colleagues and external contacts.
11. Develop and maintain accurate reporting and application systems, providing data and written reports as required. This includes report writing and providing updates on progress for the Management team and Board.
12. Support and oversee one or two volunteers, who will support with the administration of the service.
13. Provide guidance to clients on 'next steps and timescales following collation of information
14. Maintain positive working relationships with any regulatory partners and partner agencies such as the Wills Society, to ensure the post holder and practice is in line with all expected duties and regulatory requirements.
15. Regularly update your line manager on work in progress and identifying any issues in a timely and responsible manner, making every effort to ensure applications are submitted and deadlines met.
16. When relevant, attend face-to-face meetings representing Age UK Leicester Shire & Rutland.
17. To undertake other tasks which develop Age UK Leicester Shire & Rutland's income generation through funding applications, support at events and fundraising.
18. Ensure that all working practices are in line with Age UK's charitable objectives and policies.

Working Practices/General

1. As well as the Health & Safety policies and procedures above, adhere to and implement all other Age UK Leicester Shire & Rutland's policies and procedures as well as the Personal Care Policies if relevant to your role.

Details of these and other Age UK Leicester Shire & Rutland policies can be found in [F:\COMMUNAL FOLDER\POLICIES](#) or on the Select HR self-service portal.

2. Age UK Leicester Shire & Rutland is committed to its charitable aims and fundraises in order to provide accessible services for the older people of Leicester, Leicestershire and Rutland. Age UK Leicester Shire & Rutland expects all its employees to partake, when possible, in events which support these charitable aims.
3. Age UK Leicester Shire & Rutland expects all staff to have basic IT skills to enable them to use the systems within the organisation and have a willingness to embrace new technology as it is introduced. Training will be provided to staff who require it.
4. To undertake any other duties that may reasonably fall within the purview of the job.

This Job Description sets out the responsibilities of the post at the time it was drawn up. Such responsibilities may vary from time to time without changing the general character of the post or level of responsibility entailed. Variations are a common occurrence and do not of themselves constitute additional responsibilities.

Signed: _____ **Date** _____

Please print name: _____