

## PERSON SPECIFICATION

<b>Job Title:</b>	Trainee Technical Advisor
<b>Department:</b>	Estate Planning
<b>Responsible to:</b>	Estate Planning Team Leader
<b>Experience Required</b>	
Essential:	
<ul style="list-style-type: none"> <li>• Working as part of a team.</li> <li>• Liaising with clients.</li> <li>• Experience with case management systems.</li> <li>• Can demonstrate a basic understanding of wills, probate, and trusts.</li> <li>• Relevant experience such as paralegal/legal secretary/probate case handler/Financial Services Paraplanner for at least 2 years</li> </ul>	
<b>Skills Required</b>	
<ul style="list-style-type: none"> <li>• You must be highly motivated and want to increase your technical knowledge.</li> <li>• Gets enjoyment out of learning something new.</li> <li>• Can take responsibility and ownership of any tasks assigned to them.</li> <li>• Is highly organised and able to manage an increasing workload.</li> <li>• Is a self-assured individual who is able to work on their own or as part of a team.</li> <li>• Is not afraid to ask questions.</li> <li>• Is confident enough to contribute towards the common goal with new ideas and address the team and wider organisation.</li> <li>• Is analytical and always trying to find new ways to solve a common goal / improve process.</li> <li>• Is an engaging and excellent communicator.</li> <li>• Excellent general administrative skills and eye for detail.</li> <li>• Strong computer skills including Word, Excel, Outlook, other databases.</li> </ul>	
<b>Qualifications</b>	
Essential:	
<ul style="list-style-type: none"> <li>• Affiliate member of STEP/Associate member of CILEX/Working towards or achieved Level 4 Diploma for Financial Advisers or equivalent.</li> </ul>	
Preferred:	
<ul style="list-style-type: none"> <li>• Undergraduate degree (any subject) although law preferred.</li> </ul>	
<b>Other Requirements</b>	
Essential:	
<ul style="list-style-type: none"> <li>• Self-motivated, proactive and friendly team player.</li> <li>• Flexible individual who is able to respect and support others within the team.</li> <li>• Commitment and loyalty to the organisation's values &amp; mission.</li> </ul>	



Details on our Full STEP Members can be found on the STEP Members page at [www.countrywidegroup.co.uk](http://www.countrywidegroup.co.uk)



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This person specification will be reviewed and updated annually in consultation with relevant staff.