

JOB DESCRIPTION

Job Title: Conveyancer

Date: August 2019

Location: Transactional Department

Reporting to: Team Manager

Regular relationships:

Team Manager
Case Handlers
Customer Service Team
Other Departments within the business as needed

Immediate subordinates: None

Key Tasks & Activity

1. Carry out all legal aspects on residential property transactions
 - Ensure due diligence in all areas of processing a residential property transaction. To include:-
 - Leaseholds
 - Freeholds
 - Registered properties
 - Unregistered properties
 - Types of transactions to include:-
 - Purchases
 - Sales
 - Remortgages
 - Auctions
 - New Build
 - Right to Buy
 - Help to Buy
 - Shared Ownership
 - Transfer of Equity
 - Lease Extensions
 - Deeds of Variation
 - Deal professionally with other lawyers, Estate Agents and all third parties associated with the transaction.
 - Using the OMS to progress cases efficiently and to the timescale set by the Protocol.
 - Accountable for all dealings with other lawyers and other legal aspects on all property transactions.
 - Assess risk on every transaction by using skills to make pragmatic decisions and to ensure appropriate legal advice is given.
 - Take responsibility for the quality of legal advice given on every residential property transaction that is assigned to you.
 - Ensure that all activities and tasks required to be performed are undertaken promptly and proactively, prioritising where appropriate and support others to do likewise.
 - You must be able to evaluate AML information provided by a client and assess whether this is acceptable. In the event of any serious concerns or

Standards of Performance

- Performance will be monitored using monthly Key Performance Indicators
- Ensuring that work is accurately carried out in the set time frame
- Maintaining high standards of client care and service to third parties
- Taking notes and action points on instructions as and when required

<p>suspicious you must consult the Money Laundering Officer.</p> <ul style="list-style-type: none"> Identify Additional Legal Services and ensure that a client is advised and billed appropriately for these. Keep appropriate and thorough telephone/file notes to accurately record client instructions. 	
<p>2. <u>Problem Solving & Risk Assessment</u></p> <ul style="list-style-type: none"> Undertake problem solving on matters related to the conveyancing process, exhibiting a 'can do' attitude. Assess risk on every transaction utilising skills and experience to deliver pragmatic decision making and legal advice. 	All Cases. Accurate and proactive.
<p>3. <u>Provision of quality legal advice</u></p> <ul style="list-style-type: none"> Ensure quality legal advice is given on all cases they are responsible for to all clients related to the matter. 	Quality control, expert advice.
<p>4. <u>Communication</u></p> <ul style="list-style-type: none"> Ensure effective communication and implementation of company policies, procedures, plans and principles. Communicate with clients and all third parties professionally and thoughtfully. Have a friendly customer service attitude. 	Daily and as required.
<p>5. <u>Ensure workflow through the case management system (OMS)</u></p> <ul style="list-style-type: none"> Deal with incoming post, emails and faxes. Carry out next events on the OMS system and using the 'Task' to progress cases and set work for the Case Handler. Proactively progress cases through the OMS. 	Daily and ensuring all activities and tasks required are performed promptly, proactively and prioritising where appropriate.
<p>6. <u>Coaching and Mentoring</u></p> <ul style="list-style-type: none"> Provide day to day coaching and mentoring for Team Members as required Provide support to the Team Manager as required. 	As and when required. Personable and approachable attitude.
<p>7. <u>File Checking</u></p> <ul style="list-style-type: none"> Carry out file reviews prior to exchange of contracts, checking for: Accuracy of legal procedures Official copies for Registered Proprietors, Legal Charges and Restrictions Satisfactory ID and AML information on the file File contains correct signed documentation Check payment details to include all redemptions. 	Accurately and as and when required

<p>8. <u>Reinforce CDPL Values and Culture</u></p> <ul style="list-style-type: none"> • Have and maintain a positive attitude and flexible approach to your work and your colleagues. • Have a professional work ethic. • Excellent time keeping. • Exhibiting a 'can do' attitude within the workplace. 	<p>Daily. Positive attitude and professional behaviour.</p>
<p>9. <u>Holiday Cover</u></p> <ul style="list-style-type: none"> • Provide holiday cover on colleagues files as required. • Use the same care and diligence when working on a colleague's file as you would do on your own files. 	<p>As and when required. Quality control, team work.</p>
<p>10. <u>Continued Professional Development (CPD)</u></p> <ul style="list-style-type: none"> • Attend in-house training courses. • Attend external courses when appropriate. 	<p>A steady development of competence and efficiency.</p>
<p>11. <u>Performance Reviews</u></p> <ul style="list-style-type: none"> • Attend regular appraisals to include: <ul style="list-style-type: none"> ○ Yearly Performance Review ○ Monthly One to Ones 	<p>As required. Providing regular, timely and appropriate feedback.</p>
<p>12. <u>Attend Team Meetings</u></p> <ul style="list-style-type: none"> • Raise matters of concern and interest with CDPL's Senior Management Team. 	<p>Monthly (if and when required)</p>
<p>13. <u>Management Requests</u></p> <ul style="list-style-type: none"> • As required by Management Team to assist other departments. 	<p>As required. Displaying a team work attitude.</p>
<p>14. <u>Any other task required</u></p> <ul style="list-style-type: none"> • Any other task is done correctly and timely using the correct procedure at all times. 	<p>As required.</p>
<p>Resources available</p> <ul style="list-style-type: none"> • Desktop computer with Microsoft Office Package • Various digital printers and scanners • Telephone system with headsets if appropriate • Use of e-mail and access to the internet for work purposes only • Company Intranet and Public Folders 	
<p>Qualifications required:</p> <ul style="list-style-type: none"> • Qualified by experience • Solicitor • Council of Licensed Conveyancers • CILEx or • Law Degree or completed PLC will also be considered • Degree and/or Internal process 	

Skills Required (delete where appropriate)

- Previous case handling experience of a minimum of 1 year is essential
- Knowledge and experience of Microsoft Office, especially Word, Excel and Outlook is essential.
- Excellent communication skills, well-spoken and personable; able to get on with diverse personalities
- Friendly and approachable
- Reliable and consistent
- Helpful and positive attitude
- Flexible attitude to working practices and demands
- Responsible, professional and trustworthy
- Good time management and organisational skills
- Good literacy and numeracy skills
- Strong organisation, planning, problem-solving and multi-tasking skills
- Confident, resourceful and practical
- Self-motivated with the ability to work alone or within a team
- Personal commitment to equality and diversity

Training

Mandatory training such as AML, Customer Service and Data Protection will be provided by the company. External training is supported by the Company by prior agreement and where appropriate. Training will also be provided by the team manager where appropriate.

Conditions:

Working Hours: Core hours are 9.00am to 5.30pm with 1 hour unpaid lunch break, however the office open between 8.00am to 7.00pm Monday to Friday, 9.30am to 4.30pm on Saturday and 10.00am to 3.30pm on Sunday. You will be required to work 5 days and no more than 37.5 hours per week on a rota basis. The staff rota includes evening and Saturday working, you will be notified in advance.

Holiday: 20 days holiday plus Bank Holidays

Additional holiday days accrued at 1 day for every year's service in the annual leave year following completion of the 1 years' service increasing annually thereafter by one day up to a maximum of 5 additional days. Holiday year runs from 1st January to 31st December.

Any holiday entitlement will be pro-rata for part-time employees.

Pension: Enrolment into Company Workplace Pension Scheme 3 months after joining. Company stakeholder pension scheme is also available.

Terms: Company Terms and Conditions of Employment and policies and procedures provide further details.

Note: **If you are a current employee transferring to a new position/department please see your letter of confirmation for changes in terms and conditions, if any.**