

## JOB DESCRIPTION

<b>JOB TITLE:</b>	Court of Protection Case Worker
<b>DEPARTMENT:</b>	Private Client
<b>OFFICE BASE:</b>	Canterbury
<b>REPORTING TO:</b>	Court of Protection Solicitor/Manager

**MAIN JOB PURPOSE:** To assist with the management of the day to day financial matters for clients for whom we act as Attorney and Deputy. Keeping up to date balanced spreadsheets of all assets held, income received and expenditure incurred. Supporting the Court of Protection Solicitor/Manager in the day to day running of client matters to include external meetings with clients, families and third parties as required.

### **KEY JOB RESPONSIBILITIES/DUTIES:**

- Reporting to the Court of Protection Solicitor/Manager on a daily basis and assisting as appropriate with day to day activities for clients in respect of their financial affairs, for those for whom we act as Attorney and Deputy;
- Assisting with payment of day to day expenditure for those clients together with the setting up of Direct Debits as required;
- Assisting with the Management of the spreadsheets for such clients', comprising asset schedules, income and expenditure and the reconciliation to balance on a day to day basis;
- Liaising with benefit agencies as required;
- Liaising with social services and care providers as required;
- Visiting clients, families and third parties in Care Homes and in the Community as requested by the Court of Protection Manager/Solicitor in order to support or review clients;
- Assisting the Court of Protection Manager/Solicitor as appropriate with regard to the clearance of properties and collection of paperwork, which is then to be sorted for reporting purposes;
- Completing financial forms as directed;
- Preparing detailed attendance notes for all actions undertaken to comply with the annual Deputy Report Form costing Schedule and for file costing purposes;
- Basic administration;
- Working knowledge of Excel essential;
- Good telephone manner;
- Ability to communicate.

### **GENERAL OBJECTIVES:**

- To agree clear objectives linked to the Firm's business plan and participate in the performance management system, assessing performance and giving feedback as relevant;
- To have a personal development plan and evaluate the effect of training on

achievement;

- To clearly identify the standards and systems required to continually improve our client service;
- To comply with all the Firm's relevant policies and procedures;
- To ensure confidentiality on all appropriate matters and recognise that any breach of this confidentiality will be treated very seriously.

February 2024

Signed..... Date.....

## PERSON SPECIFICATION

Attribute	Essential	Desirable
<b>Qualifications, Accreditations etc.</b>	<ul style="list-style-type: none"> <li>• Good all round level of education, GCSE A-C grades/Levels 9 -4 including English and Maths</li> <li>• 2 A Levels or equivalent</li> </ul>	<ul style="list-style-type: none"> <li>• AAT qualifications or working towards</li> </ul>
<b>Previous Work Experience</b>	<ul style="list-style-type: none"> <li>• Experience within a legal firm</li> <li>• Involvement in work associated with court of protection</li> </ul>	<ul style="list-style-type: none"> <li>• Specific bookkeeping experience</li> </ul>
<b>Knowledge and Skills</b>	<ul style="list-style-type: none"> <li>• Advanced excel</li> <li>• Proficiency in Microsoft Word, Outlook</li> <li>• Numeracy skills</li> <li>• Literacy skills</li> <li>• Good understanding of invoicing processes</li> <li>• Accurate data entry skills</li> <li>• General administrative skills</li> </ul>	<ul style="list-style-type: none"> <li>• Working knowledge of Partner for Windows (P4W)</li> </ul>
<b>Personal Qualities and Behaviours</b>	<ul style="list-style-type: none"> <li>• Excellent attention to detail</li> <li>• Organisational skills</li> <li>• Good communication (written and oral)</li> <li>• Empathetic approach</li> <li>• Confidential</li> <li>• Assertiveness</li> <li>• Reliable and well presented</li> <li>• Keen to develop/willing to undertake relevant qualifications/training</li> </ul>	

February 2024