

 Livingston James



MACROBERTS

LLP

## POSITION PROFILE

**Partner - Private Client  
Edinburgh**



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# The Firm

MacRoberts is one of Scotland's leading independent law firms with over 150 years of experience in the legal sector. The firm maintains strong links within the Scottish economy, and as well as working with individuals and families on personal matters, works with large private and public companies, small and medium-sized enterprises, entrepreneurs and owner-managed businesses, banks and financial services institutions, public sector bodies, charities and all levels of government.

Historically, MacRoberts started as a strong private client firm in the west of Scotland (and still retains that uninterrupted heritage today with a well-respected and busy private client practice in Glasgow). Until recently, it had focused its private client practice in the west but following the growth of the family law team in Edinburgh from a standing start in 2014 and the strategic acquisition of the well-respected Edinburgh based Murray Snell business in early 2019, it now has an excellent platform on which to build its private client practice in Edinburgh. This investment in the Private Client team in Edinburgh means that the Edinburgh based Family Law team is now ranked in both *Chambers* and *Legal 500* and won **Family Law Team of the Year** at the Scottish Legal Awards in 2020.





# The Firm

The private client offering in Edinburgh now therefore encompasses three main areas:

- Family and matrimonial
- Residential conveyancing
- Wills and executries

All members of the team working in these three areas sit within the "Private Client East" practice group and comprise a total of 16 personnel. Key contacts include:



Jacqueline Stroud  
Partner



Marika Franceschi  
Partner



Philippa Snell  
Legal Director



Lorraine Tullan  
Legal Director

Advising people has always been at the heart of our business. Our dedicated team of family lawyers has developed a solid reputation for dealing with a wide range of family law matters, including divorce, separation, child custody and relocation, adoption and surrogacy, prenuptial and cohabitation agreements, civil partnerships and mediation and collaboration.

We advise clients on a wide range of matters relating to their personal affairs, whether it is making a Will or appointing a Power of Attorney, setting up or managing a Trust, submitting Guardianship applications or dealing with the administration of executries.

We work collaboratively with our clients to help them find the best possible outcome, helping reach early settlement and maintain positive relationships where possible. The team focuses on offering all of our clients a pragmatic and practical approach, whilst always being mindful of delivering value for money.

Our key services for individuals and families include:

- Adoption & Surrogacy
- Buying & Selling Property
- Caring for the Elderly
- Child Contact, Residence & Relocation
- Civil Partnerships
- Cohabitation Agreements
- Divorce
- Executries
- Making a Will
- Mediation & Collaboration
- Power of Attorney
- Pre-nuptial Agreements
- Separation
- Trusts



# The Firm

## Firm Wide Success

MacRoberts has seen its revenue and profits continue to increase as a result of a combination of winning new clients through competitive tenders and through existing and long standing relationships.

The firm has invested heavily in IT and technology and has an excellent operations team supporting the fee earners across all areas of the business including IT, Compliance, People and Development and Finance. With a recent move in the last 12 months to new premises on the top floor of 10 George Street, Edinburgh, combined with the heavy investment over many years in IT, the firm now offers an excellent hybrid working environment.

## Independent Recognition



The firm continues to be recognised independently and as well as winning **Family Law Team of the Year** was recently named **Corporate & Commercial Team of the Year** at the Scottish Legal Awards 2020, where the judges noted that despite the challenges and economic uncertainty posed by the pandemic, the team had continued to work with clients to progress deals with a commitment to continuity of service. In 2019, MacRoberts also received 'Highly Commended' in the **Corporate M&A Team of the Year** at the British Legal Awards against competition from Magic Circle firms and in 2018, was named **Property Team of the Year** at the British Legal Awards, being the only Scottish-based firm to be shortlisted at these Awards.



# Background to the Current Opportunity



Following the successful integration of Murray Snell into the MacRoberts family, the firm now looks to expand the Private Client offering. This opportunity has come about to ensure succession planning is properly catered for whilst additionally ensuring the firms growth ambitions are met and current client portfolio looked after.

With a strong and credible team in the West of Scotland, coupled with the legacy reputation of Murray Snell in the East and the strength of the Family Law practice, this Partner appointment offers a genuinely unique opportunity to join an established offering with clear ambitions, a strong platform and a commitment to grow.

This appointment is a result of continued success, and with a couple of the Murray Snell Partners' taking a step back, offers an excellent opportunity for someone to maintain an existing portfolio of clients, whilst also being given full autonomy to further develop the firm's offering and portfolio.

MacRoberts' reputation for delivering a high calibre service provides an excellent platform to grow the business. Their smart investment decisions and robust and agile decision making has allowed them to be competitive and dominant in the market, acting as a bit of a thorn in the side of the "larger players". Based on MacRoberts' success to date, it is exciting to think what might now be achieved as they look beyond and go for continued growth.

This position provides direct access to the Managing Partner and a peer group of highly accomplished legal experts. The firm has created an incredibly collaborative and welcoming environment whereby everyone has a "voice". Leaders are encouraged to be dynamic and entrepreneurial in style, be creative with new innovations, and to drive excellence in the market.

MacRoberts is a firm which truly believes that the development of the right people will result in the growth of MacRoberts as a greater business. The firm has thrived because of the quality of its individuals and the work it does to make a long-term difference to its clients' successes and goals. With strong leadership already in place, the selected professional will immediately gain a reputable peer group and personal advancement through the layers of partnership.

A direct route to Partnership in a successful and well-established organisation is rare enough; considering the potential of the firm to achieve further growth and continued success, the career opportunity for an ambitious current or aspirant Partner to join the firm is second to none.



# The Role

## Position Purpose

To take a key role in the development and evolution of the Private Client business offering in the Edinburgh Office. Edinburgh, as Scotland's capital city and financial centre, has huge potential for business growth and MacRoberts is seeking a Partner to take a prominent role in growing this service line.

## Position Overview

The role will have responsibility for expanding on the quality service of the Private Client business in Edinburgh. The appointee will be expected to represent and champion the best interests of the firm across all business areas. This position carries strategic responsibility for supporting development and growth and managing the execution of a profitable business plan with colleagues in the Individual / Family Group.

Alongside peers and colleagues, there is an opportunity to contribute to the evolving business strategy of the firm at a wider level in Scotland. The position provides the successful candidate with the opportunity to join a firm with an already well-established client base and an excellent reputation in Private Client work in the east (Murray Snell). It requires ambition and resource to develop the firm's position in the market, and crucially, it offers an opportunity for you to make a difference in your own career. You will be joining a creditable team of legal professionals two Partners, two Legal Directors, one consultant, two solicitors and a Paralegal with a portfolio of long-established clients.

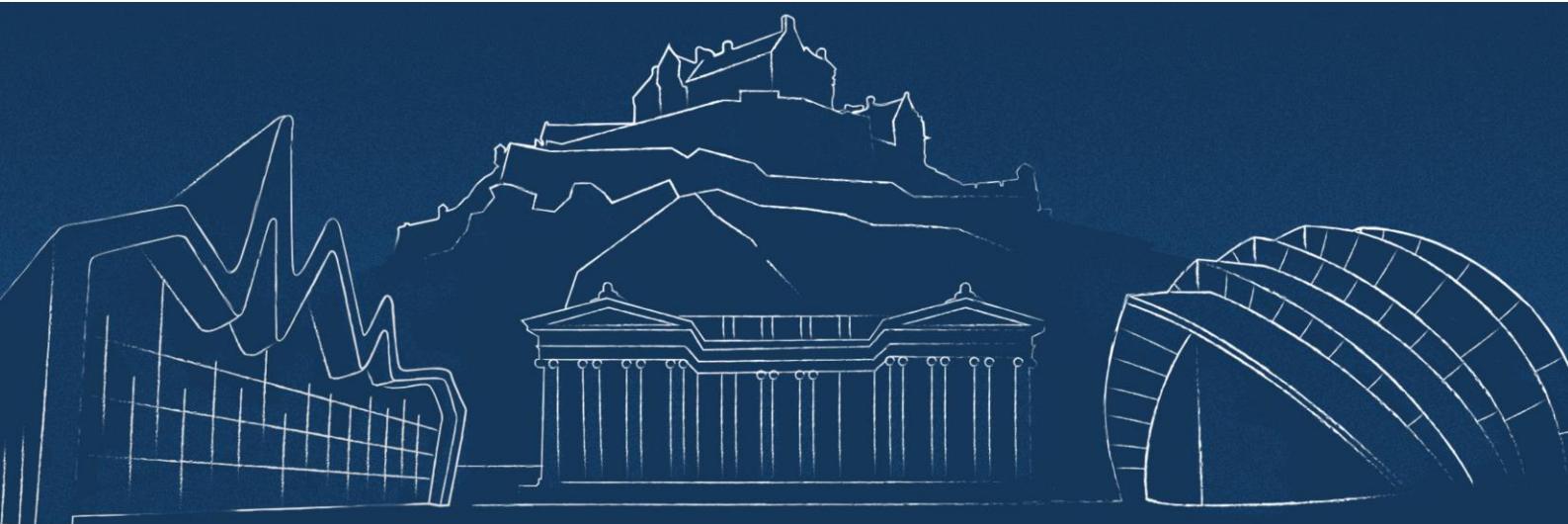


# The Role



## Key deliverables include:

- Maintaining and developing existing relations with the firm's clients
- Delivering outstanding results for clients
- Motivating and developing the team to ensure exceptional service delivery
- Assisting in the development of new relationships with third party referrers
- Participating fully as part of the partnership team and contributing to the firm's development
- Creation/review of the vision for the delivery of a high quality, personal service and delivery of a business plan and targets that sit in the firm's wider group objectives
- Creation and execution of business development strategy
- Coordinating/engaging third party networks to raise the firm's profile
- Supporting other MacRoberts teams through broader representation of the firm
- Acting as external spokesperson/generating PR and comment on issues relevant to raising the profile of the firm



## Key Duties & Responsibilities:

- Undertaking fee earning work, working both independently and as a member of the team and providing a profitable contribution to the work of the department
- Conducting a broad range of private client matters on behalf of clients
- Drafting of Wills, Trusts, Powers of Attorney, advice on Inheritance Tax and dealing with Trust and Estate Administration
- Management of support services for which you are responsible, including supervision of support staff
- Willingness to participate in the growth and future development of the team, assisting in the build-up of the client database and marketing the firm's services

# The Role



- Maintaining orderly and up-to-date files and complying with the firm's policies on file management
- Completing time recording and other management records required by the firm
- Cross-referring work and clients within the firm
- Ensuring compliance is adhered to in all activities
- Financial control of your own matters regarding cash flow through collection of monies on account and billing procedures
- Recognising fee-earning opportunities and develop as appropriate
- Being accountable for your own development, seeking out opportunities to learn new skills to continuously improve



# Preferred Candidate Profile



MacRoberts is seeking a future leader who is dynamic, collaborative and credible.

As a key, client facing role, the successful candidate will always represent the professionalism and quality of MacRoberts. A demonstrable track record of engaging new clients and building long lasting relationships, they will have a strong desire to grow their personal client base and to cross refer to their colleagues; at all times looking for opportunities for MacRoberts to help their clients achieve their goals through the provision of appropriate advice.

Building on strong technical foundations, appropriate candidates will have had previous success developing teams to deliver high quality service. The ability to lead and engage clients and colleagues will be paramount to success in this role.

The most significant elements of this position are strong personal communication skills and an understanding of the private client concerns. MacRoberts is looking for a candidate with the prowess to grow and develop the Private Client team, and additionally, be a significant contributor to creating the firm of the future.

## Personal Characteristics / Experience

- Private Client (specifically wills, trusts and taxes) law expertise with a minimum of 7 years PQE gained within a firm who are renowned for their private client offering
- Excellent communication and interpersonal skills and a genuine interest in individual clients and for providing tailor made advice
- Existing Partner within their current firm looking for a new challenge within an entrepreneurial and progressive firm; or a solicitor with the potential to take the first step into partnership
- Demonstrate a clear following/network of contacts or clearly articulate how they have developed and nurtured relationships of key clients in their existing firm
- Possess an excellent technical knowledge of all areas of private client
- Demonstrable track record of success
- Ability to develop new business and nurture existing relationships
- With appropriate gravitas and professionalism to influence at senior level
- Driven and entrepreneurial in spirit, looking for the opportunity to take the lead
- Enthusiastic and committed to making a difference
- Of appropriate experience level to be able to help lead Murray Snell / MacRoberts well into the future

# Remuneration & Recruitment Process



Attractive package commensurate with background and experience required for the role.

For more information on remuneration please contact:



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## The Recruitment Process

First stage interviews will be conducted by retained consultant, Sophie Randles of Livingston James.

Shortlisted candidates will thereafter be invited to meet with Jacqueline Stroud, Partner, Marika Franceschi, Partner and Alan Kelly, Board Member & Partner.

Successful candidates will then meet a series of additional Partners and key stakeholders across the firm including Neil Kennedy, Managing Partner.

Final interviews will involve the presentation of a short business plan to a Partner panel.

Please note, additional informal interviews can take place if required, as instructed by Sophie Randles on behalf of MacRoberts.