



MACROBERTS

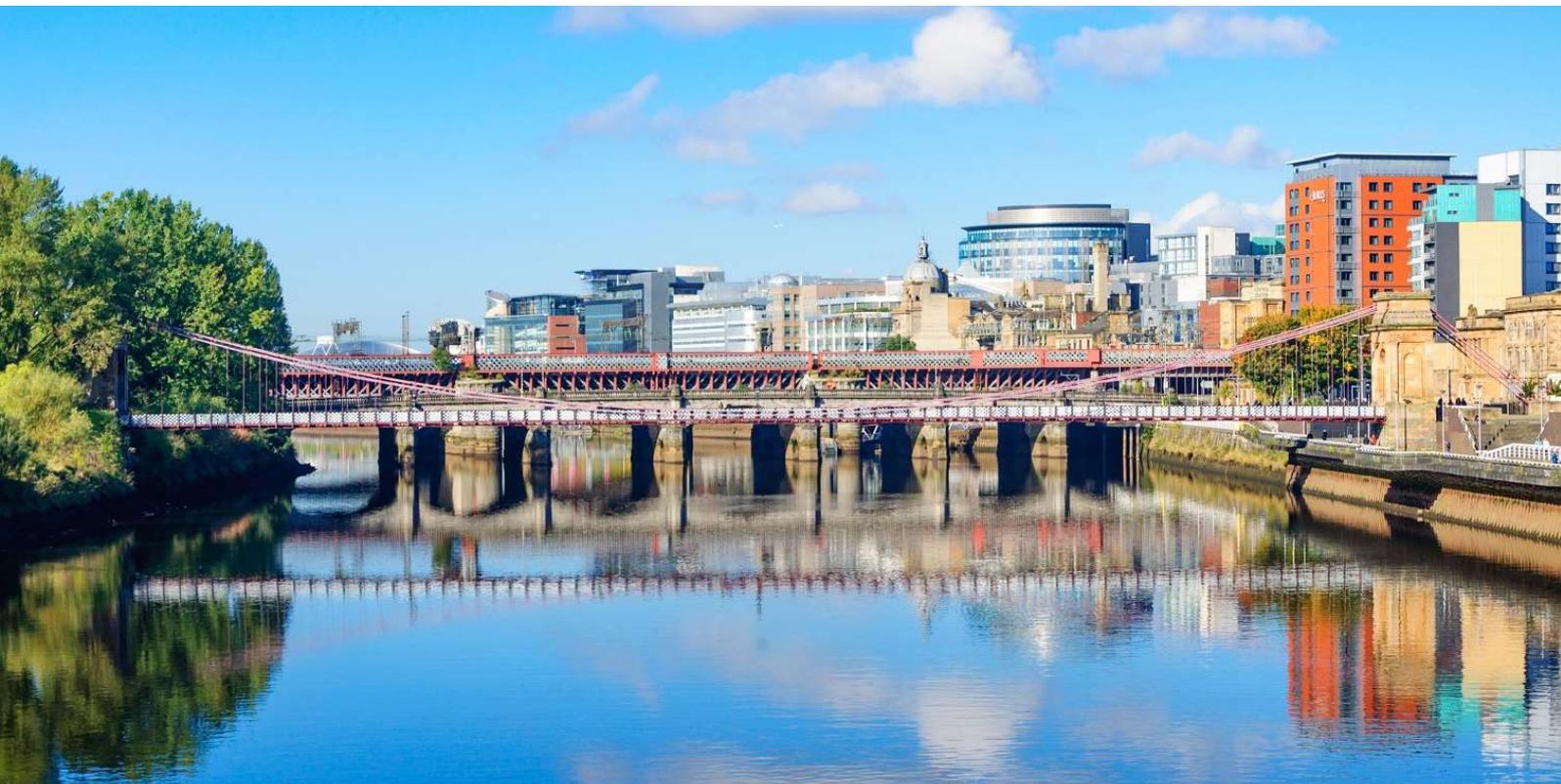
LLP

POSITION PROFILE

Private Client
Glasgow



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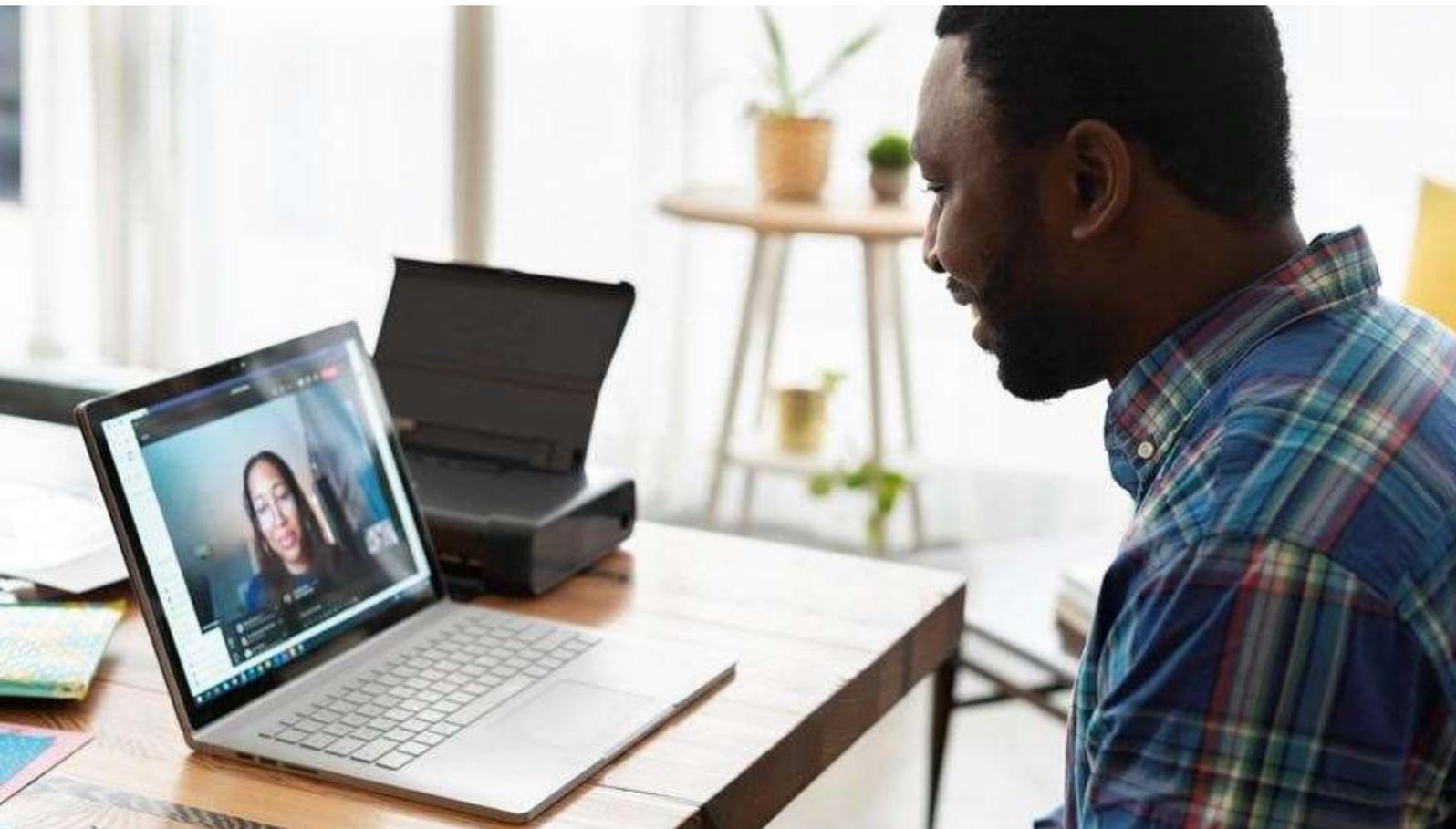


MacRoberts is one of Scotland's leading independent law firms with over 150 years of experience in the legal sector. The firm maintains strong links within the Scottish economy, and as well as working with individuals and families on personal matters, works with large private and public companies, small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

MacRoberts has a strong private client team in Glasgow and acquired the well-respected Edinburgh-based firm Murray Snell in early 2019, to enhance its existing private client practice in Edinburgh.

The Glasgow Private Client Team boasts an enviable reputation for providing top-quality advice on all aspects of Private Client practice, including: tax mitigation and succession planning; Wills; Trust advice, formation and administration including Personal Injury Trusts; Powers of Attorney, guardianships and incapacity issues; Estate Administration including contentious executries; and bespoke advice on all manner of issues.

We work collaboratively with colleagues in other teams to provide a joined-up approach to whatever issues our clients, their families and businesses might face at all stages of their lives.





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.





With a busy and ever-growing practice, the Glasgow Private Client team looks to appoint a capable and dedicated Private Client Solicitor, reporting direct to the Partners within the team and dealing with all aspects of our practice. They are looking for exceptional talent, ranging from Associate to Director-level.

The firm has created an incredibly collaborative and welcoming environment whereby everyone has a “voice” and is encouraged to be dynamic and entrepreneurial in style, to be creative with new innovations, and to drive excellence in the market.

MacRoberts truly believes that the development of the right people will result in the growth of the firm as a successful 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 a clear support for professional growth and advancement.

Position Purpose

To work with the partners in the team, servicing their busy and growing caseload and to contribute to the wider growth of the firm.

Position Overview

The role will have responsibility for handling a varied and interesting caseload of work across the Private Client spectrum, building relationships within the team and the wider firm, and reporting direct to the Partners. The appointee will be expected to represent and champion the best interests of the firm across all business areas.

The role requires ambition and resource to provide top quality client care and to support the firm’s position. Crucially, it offers an opportunity for you to make a difference in your own career. You will be supported fully in acquiring full STEP qualification.

The job title and remuneration will be dependent on experience.

Key deliverables include:

- Maintaining and developing existing relations with the firm’s clients
- Delivering outstanding results for clients
- Working collaboratively with the team to ensure exceptional service delivery
- Assisting in maintaining and developing relationships with third party referrers
- Participating fully as part of the team
- Supporting other MacRoberts teams through broader representation 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, providing advice on Inheritance Tax and dealing with Trust and Estate Administration
- 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
- 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 and developing fee-earning opportunities
- With full support, being accountable for your own development, seeking out opportunities to learn new skills and to improve continuously





MacRoberts is seeking a Private Client practitioner who is dynamic, collaborative and dedicated.

As a key, client-facing role, the successful candidate will always represent the professionalism and quality of MacRoberts. They will have a strong desire to maintain and support the 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 ideally have previous experience within a dedicated Private Client team, and previous exposure to high-quality Private Client work. The job title and remuneration on offer will be dependent on the successful candidate's experience.

Personal Characteristics / Experience

- Private Client PQE gained within a firm which is recognised for its Private Client offering
- Excellent communication and interpersonal skills and a genuine interest in individual clients and for providing bespoke advice
- Driven and entrepreneurial in spirit, looking for the opportunity to develop
- Enthusiastic and committed to making a difference





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 Carole McAlpine-Scott and James Inglis, the partners within the Glasgow team.

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