

JOB DESCRIPTION

Job Title	Private Client - Trusts & Estates Trainee	Department	Private Client
Reports To	Private Client Manager	Location	Chesterfield

Role Overview:

An exciting opportunity has arisen for a school or college leaver to join our award-winning Private Client team as a Trainee specialising in Trusts and Estates.

This role offers the chance to help real families make important decisions about their finances, property and future. You could be assisting with the implementation of an individual's wishes, helping to protect family wealth for future generations, managing diverse and valuable assets, and supporting the resolution of complex legal and taxation matters.

As a STEP Gold Employer Partner, Shorts provides a genuine route into the profession through a fully supported study programme towards the STEP (Society of Trust and Estate Practitioners) qualification.

You'll earn while you learn, working alongside Chartered Tax Advisers, STEP-qualified practitioners and legally qualified advisers. Starting with day-to-day administrative support, your responsibilities will grow over time as you develop the technical knowledge, skills and confidence needed to progress within this specialist area of private client work.

Key Responsibilities:

- Provide general administrative support to the Trusts and Estates team, including filing, scanning, and maintaining accurate client records on our systems
- Help prepare and format client correspondence, letters, and standard documents, under the guidance of senior team members
- Helping to check and verify new client information, including reviewing identity documents (such as passports and driving licences) and proof of address to ensure we meet legal and regulatory requirements.

	Attend training provider sessions and complete coursework as part of the apprenticeship study programme, working towards the STEP Certificate in Trusts and Estates and onward STEP qualifications
	Answer the telephone and respond to straightforward client queries professionally, passing on more detailed or technical questions to senior team members
	- Take on increasing responsibility as your knowledge and confidence grow, with the nature of your duties developing over the course of the apprenticeship in line with your training and progress - Maintaining confidentiality and handling sensitive information with discretion when working with high-net-worth individuals and families.

Skills / Experience / Qualifications

Skills:

- Good numerical and analytical skills, with attention to detail and accuracy
- Strong written and verbal communication skills
- Well organised, able to manage own workload and meet deadlines
- A proactive approach and willingness to learn
- Good working knowledge of Microsoft Office, particularly Excel

Experience:

- No prior accountancy, legal, or trust and estate experience is required, although any exposure to an office or customer-facing environment is beneficial
- Experience of working as part of a team, gained through school, college, part-time work, or extra-curricular activities

Qualifications:

- A minimum of 5 GCSEs at grade 4/C or above (or equivalent), including English and Maths
- A-Levels (or equivalent) achieved or expected; a relevant qualification/certificate is not required but may be beneficial
- Eligibility to enrol on the apprenticeship study programme and register as a STEP Student Member, as set out by the training provider

Additional Information

- To carry out any other duties as identified to ensure the smooth running of the business.
- **Confidentiality** - Where in the course of your duties you have access to confidential information relating to customers or clients you should ensure confidentiality is always maintained and any data is treated in accordance with company policies and procedures.
- **Equal Opportunities** - To support the business equality and diversity policy and promote an environment of inclusivity and support to customers and our people.
- **Health and safety** - To adhere to health and safety procedures and to take responsibility for your own safety and that of others and report any incidents or concerns to line management.
- **Customer Focused** - We put our customers' needs and expectations at the heart of all that we do. We expect our employees to have a full understanding of those needs and expectations so that we can provide high quality, appropriate services always.
- **Learning and Development** - To participate in any learning and development identified as appropriate for the role and share ideas for continual personal and firm development.
- **Quality of our Work** - To strive to maintain high standards of professionalism, work outputs and quality of work in line with the business priorities.