

Job Description - Customer Service Team Member & Office Administration Assistant

Job Title: Customer Service Team Member & Office Admin Assistant

Date: 22/10/25

Department: Work from Company Office, Home, or Clients Home as required
(Cambridge offices currently in Impington and Longstanton)

1. Job Details

(a) Responsible to: Mark Layzell

Legacy Matters are a small but growing Wills, Trust and Legacy Planning advisory company. We are members of the Society of Will Writers and the Society of Trust and Estate Practitioners and adhere to their strict compliance systems.

Office administration tasks include managing diaries, booking appointments, conducting various administrative tasks related to the drafting and processing of Wills, Lasting Powers of Attorney, Trusts, and Probate services. The technical work will be completed for each case, but there will be a need to proofread documents and ensure they are properly formatted.

(b) Working Hours:

Part time / Full Time, flexible 5-35 hours a week, (hours to be determined)

Possible range of working hours is : Mon-Fri 9am-8pm & Saturday 10-2pm.

The level of available work varies across the year and overtime will be available at busy times.

(c) Salary Range:

£13 an hour

Opportunity to progress within the company for the right candidate(s).

(d) Essential Qualifications :

GCSE's required in the core subjects are essential.

Ideal candidate would be degree educated, but this is not essential for this rôle.

Excellent Microsoft Office skills required (word processing in Word, Outlook and spreadsheet (excel and google docs) skills essential.

A keen attention to detail. a positive, 'Can Do' attitude, and the desire to improve both themselves and work processes is required.
Excellent proof reading skills desirable.

(f) Essential Experience :

The ideal person for this role will have experience of customer service, office administration or office management responsibilities.

Experience in the Will writing, or legal sector is not necessary, as full training will be given.

A willingness to learn new things and offer solutions to problems is essential.

Some of our clients are elderly or vulnerable so it is necessary for someone who has a patient approach to speaking to our potential clients. The successful candidate will need to gather information in order to understand a persons / families circumstances, and then will (after training) need to explain the options and the implications of the options available to clients.

2. Job Summary (Description of main purpose of job):

Legacy Matters are a small but growing Wills, Trust and Legacy Planning advisory company. We are members of the Institute of Professional Will Writers, The Society of Will Writers and the Society of Trust and Estate Practitioners and adhere to their strict compliance systems.

Office administration tasks include managing diaries, booking appointments, conducting various administrative tasks related to the drafting and processing of Wills, Lasting Powers of Attorney, Trusts, and Probate services. The technical work will be completed for each case, but there will be a need to proofread documents and ensure they are properly formatted.

It is also essential to ensure that cases are dealt with effectively in a timely manner, and that clients are kept informed about the process of their cases.

We will be providing the leads / contacts for you to call, you will be provided with IT systems to record the calls and progress on those calls. You will also have a log in for an internet-based phone system to make the calls.

3: Key Tasks

- Answering the telephone and dealing with enquiries or clients appropriately.
- Making outbound calls to leads from referral partners or from other marketing activities to promote the benefits of the company's services and current offers.
- Arranging new appointments for Will reviews and Legacy Planning Reviews with an appropriate Legacy Planning consultant.
- Making information gathering calls prior to appointments, capturing information accurately and recording it in our online systems.
- Occasionally making cold calls to individuals and businesses to raise the profile of our services.
- Tracking the progress of leads in our online systems to manage the flow of work and send out appropriate communications to contacts depending on their decisions on calls.
- Present a professional face of the company to new and existing contacts.
- Keeping track of new and existing cases and ensuring effective and efficient processing of the tasks related to each case.

- Various administrative duties needed to complete cases in a timely and professional manner.
- Following processes needed to create, format or amend various documents.
- Liaising with other professional members of the team and ensuring they have the information they require.
- Keeping track of all cases and ensuring we provide the best possible customer experience with our services.
- Liaising with the company director and other team members to ensure that all work activities are handled effectively.
- Working alone or as part of a dynamic team as required.
- Maintaining accurate record keeping for own work and client cases.
- Creating and drafting invoices using Xero (accountancy software)
- Chasing unpaid invoices and overdue documents with clients (via email and phone)
- Scanning, sending and storing various paperwork both physically and to online storage.

We are looking for someone with good customer service skills, good telephone manner and who is highly motivated, enthusiastic with a pro-active approach.

There is the opportunity for team members to advance within the company as the company grows and to gain industry specific qualifications.

For the appropriate candidates, there is the opportunity to train as a Legacy Planning consultant and be someone who can provide Estate or Legacy Planning advice to clients.

It is anticipated that Legacy Matters will be hiring between one and three candidates to work together as a team, provide flexibility and support to each other within the team structure.

Most work can be completed remotely at home, but some document processing work will need to be conducted within company premises due to security and confidentiality of documentation.

Legacy Matters have offices in both Impington and Longstanton Cambridgeshire.

This job description is not exhaustive, and there is likely to be an element of flexibility within the role, and a need to complete other tasks as needed.

If this sounds like the role for you, then please send a covering letter, setting out your interest and any experience in the role, along with your CV to Office@LegacyMatters.co.uk or call 01223 867373 with any questions.