

Job Description – Customer Services Team

Member (Document Specialist)

Legacy Matters

Legacy Matters is a growing legacy planning and estate management company. We offer bespoke consultation and writing services for a variety of estate matters including Wills, Trusts, Lasting Powers of Attorney, and Probate. We are members of the Society of Will Writers and the Society of Trust and Estate Practitioners and adhere to their strict compliance systems.

1. Role Overview

Job Title: Customer Services Team Member (Document Specialist)

Date: 23/01/2026

Location: Work from company office (Longstanton / Impington), later facilitation of hybrid working

The Customer Services Team Member (Document Specialist) will be responsible for the creation and editing of legacy and estate related documents, including (but not limited to) wills, trusts, Lasting Power of Attorney documents, and letters to executors and attorneys.

The CSTM will use specialist software to create these documents but use their own strong written English and formatting skills to proofread and amend the documents as necessary. They will revise and edit draft documents in accordance with client feedback and manage the document review and approval process.

This role will also include records management and maintenance duties for our client database. They will have to interpret, clarify, and follow document creation instructions provided to them by other staff members, particularly the Legacy Planning Consultant.

2. Candidate Specification

GCSEs (or equivalent) including Maths and English Language. [Essential]

IT and Microsoft Office skills (Word, Outlook and Excel). [Essential]

Proofreading abilities and good attention to detail. [Essential]

Experience using databases to manage client or customer records. [Essential]

Strong communication skills, written and verbal. [Essential]

A positive attitude, and the desire to grow professionally and innovate on procedure. [Essential]

Degree (or equivalent) in a relevant field [Desirable]

Previous experience in document drafting and proofreading [Desirable]

Previous experience working in legacy, estate, or legal services [Desirable]

Courteous telephone manner [Desirable]

3. Duties and Responsibilities

Please note that the list below is a non-exhaustive guide. Other duties may be required as directed.

- Using specialist industry software (WillWriterPro) to create estate and legacy documents.
- Using templates to write and send letters to clients, executors, and attorneys.

- Proofreading and amending draft documents.
- Receiving, compartmentalising, clarifying, and undertaking written and verbal instructions.
- Maintaining the data clarity and integrity of client data in our records management system (Keap).
- Co-ordinating multiple concurrent workloads, involving internal and external stakeholders.
- Collaborating with other members of the Legacy Matters office team.
- Maintaining regular channels of communication between the office team and clients, and between office and remote Legacy Matters workers.
- Extract and analyse client and sales data at regular intervals, for the purposes of company review and reflection.
- Workload management, both for independent work and work in a small team.
- Methodical and structured approach to document and data processing.
- Creating documents to review and suggest improvements on current company procedure.
- Other duties as reasonably directed by supervisor.

4. Employee Benefits

Legacy Matters is a small and burgeoning business, with ambitions to grow sizably over the next few years. There is the opportunity for team members to advance within the company as the company grows and to gain industry specific qualifications.

The successful candidate will have ample opportunities to pursue continual professional learning and career development. They will have a great impact on the work of the business and a large freedom to innovate and improve on procedure as may be achieved.

5. Salary and hours

Salary: £13-£15 an hour (negotiable dependant on experience)

Hours: Part time / Full Time, flexible 20-35 hours a week, (hours to be agreed with candidate) Core office hours are between 11am-3pm, Monday to Friday. Other flexible and home working hours can be considered.

The amount of work varies throughout the year. Overtime will be available at busy periods.

If you are interested in this role, please send a covering letter, setting out your interest and relevant experience, along with your CV to Office@LegacyMatters.co.uk. Please call 01223 867373 with any questions.