

Title: Private Client Personal Assistant

Department: Corporate (Private Client)



ROLE DESCRIPTION

Role/Responsibilities

As a Personal Assistant in the Private Client department, your role is to support two partners and three associates. An additional Personal Assistant will be recruited to look after the remaining partners and associates (but you may be expected to look after them during the recruitment process).

The role covers a wide range of PA activities including secretarial and administrative services. You will be required to take a proactive role in the continued enhancement of working practices, maintaining and constantly improving quality standards and our service to clients.

Responsibilities will include:

Strategic Diary and Inbox Management:

- Take full ownership of complex diary management for partners and associates, including proactive scheduling of internal and external meetings, anticipating and resolving conflicts, and ensuring partners and associates are fully briefed and prepared. Monitor and manage partners' inboxes, prioritising correspondence, flagging urgent matters and drafting responses where appropriate.

Client Relationship Management:

- Act as an alternative point of contact for clients, ensuring a professional and seamless experience. Manage client communications, coordinate follow-ups, and maintain up-to-date records of client interactions. Proactively build and nurture relationships with key clients and their representatives.

Business Development Support:

- Work closely with the Business Development (BD) team to coordinate partners' (and associates', as appropriate) involvement in client pitches, events, and networking opportunities. Prepare briefing packs, research prospective clients, and ensure partners are equipped with relevant information for meetings and presentations.

Matter Opening and Compliance:

- Oversee the end-to-end process for opening new clients and matters to be undertaken by the team's Administrator, including conflict checks, KYC/AML/sanctions compliance, and production of client care

documentation. Liaise with compliance and risk teams to ensure all regulatory requirements are met.

Internal Meetings Preparation and Follow-Up:

- Prepare detailed agendas, collate and circulate meeting papers, and take accurate minutes for key meetings. Track action points and ensure timely follow-up, keeping partners informed of progress and outstanding items.

Travel and Event Coordination:

- Arrange travel itineraries and accommodation for partners (with the help of an external travel consultant, where relevant), including international travel. Organise client entertainment, internal and external events, and training sessions, ensuring all logistics are managed efficiently and within budget.

Financial Administration:

- Take responsibility for fee earners' monthly billing cycles and monitor WIP and credit control and assist fee earners in managing their financial performance. Oversee the drafting and reviewing invoices, managing narratives, and liaising with the team's Administrator and finance team to resolve queries.

Document and File Management:

- Oversee the drafting, proofreading and formatting of correspondence and legal documents to a high standard, ensuring compliance with the firm's house style. Oversee electronic and physical filing systems, ensuring all documents are saved and archived in accordance with firm protocols and any relevant registers are maintained.

Process Improvement and Knowledge Sharing:

- Identify opportunities to enhance administrative processes and working practices within the Private Client Support team. Share best practice with colleagues, contribute to the development of the team's working practices manual, and support the onboarding and training of new team members.

Teamwork:

- Working closely with the other Personal Assistant (including providing cover when they are not working), other members of the Private Client Support Team and fee earners to ensure continuity for all.

Confidentiality and Professionalism:

- Handle all matters with the utmost discretion and professionalism, representing the firm's values in all interactions with clients, colleagues, and external contacts.

PERSON SPECIFICATION

The ideal candidate will possess most of the following attributes:

- Strong academics, particularly English and Maths;
- Demonstrable experience as a Personal Assistant with at least a minimum of 6 months' experience working within a Private Client team;
- Excellent IT skills and familiarity with the commonly used applications for document management and dictation;
- Meticulous attention to detail and be able to demonstrate experiences of working as a team; and
- Excellent time management and organisational skills.

You will be a confident communicator with a positive work ethic and the ability to build credible relationships with clients both internal and external. We are looking for an individual who presents themselves with professionalism and polish, who will inspire the confidence of clients and colleagues.



BENEFITS

We reward our staff for their continued commitment to the success of this Firm with a comprehensive range of benefits. Fladgate have also adopted a hybrid model of both office-based and home working which is a discretionary benefit depending on the role and responsibilities.

ON JOINING

- Life assurance scheme – 5x annual salary (non-contributory)
- Annual holiday entitlement – 26 days per calendar year (full time)
- Flexible holiday scheme – buy up to five days extra holiday per annum
- Staff introduction bonus – £1,000 - 5,000 depending on vacant role
- Personal training/yoga – free weekly sessions
- Free online GP service – 24/7 video GP consultations

AFTER 2 MONTHS

- Group personal pension plan of 4% - 5% employer contributions
- Matching employee contributions of 4% - 5% (automatically enrolled)
- Processed via salary sacrifice 50% of employer NI savings added to contribution

AFTER 3 MONTHS

- Company sick pay scheme
- Group income protection
- Season ticket loan
- Private Dental Plan – payable through monthly payroll
- Gym membership scheme – interest free gym membership loan
- Eye test vouchers – every two years

AFTER 6 MONTHS

- Private medical insurance (PMI) for employee cover is employer-paid, however additional family cover is employee-paid

At Fladgate, we recognise the importance of an agile approach, not only in the way we work with our clients, but our employees also. Hybrid working at Fladgate varies depending on your role and responsibilities. As a general rule, for those who can work from home and have roles compatible with home working, we operate a hybrid pattern of two days remote working and three days office based.



Our aim

To create a culture where our people can thrive and feel supported at work. As such, the Firm's approach to parental leave is designed to ensure that anyone who is a parent or is expecting to be a parent has a positive experience prior to parental leave, during their parental leave and upon their return to work whichever type of leave they decide to take.

Our parental leave policies* cover:

Maternity – We offer both statutory maternity pay (SMP) and enhanced maternity pay (EMP), subject to eligibility*. If eligible, EMP provides 100% of your salary in weeks 1-20 and 50% of your salary in weeks 21-32. Weeks 33-39 are at the government set rate (or 90% of salary, whichever is lower). In order to receive EMP, you must undertake to remain continuously employed by the Firm and to return to work for a period of at least six months from the date of your return to work before providing notice of resignation*.

Paternity – We offer enhanced paternity pay (EPP) as full basic pay for up to three weeks*.

Shared Parental Leave – SPL allows parents to take up to 50 weeks' shared leave in total following the birth or adoption of a child*.

Adoption and Surrogacy*

Ordinary Parental Leave – Allowing up to 18 weeks unpaid leave for employees who have parental responsibility for a child / children*.

* Full details can be found in our staff handbook, which will be provided upon offer of employment.





Our focus

We know that to achieve our inclusion and diversity objectives we need to focus on a number of areas:

Developing a diverse leadership – We have a mix of different ethnicity and genders on our leadership groups. We are working hard to improve the gender balance of our partner team and we are striving for 30% female representation by 2025.

Attracting a diverse workforce – This means adopting a properly personal approach when connecting with those interested in joining our team including: ensuring fairness in our processes; working with those, like recruiters, who help us in this; a commitment that you will always meet male and female talent in our recruitment interviews.

Engaging with everyone in our team to ensure they are heard, supported and understood. Encourage everyone to develop their own voice in shaping our culture, their future and our service to clients. That might be working flexibly or that might be a specific career programme - everyone needs different things at different times.

Helping all our people in all roles to achieve their full potential. We provide training, coaching, internal mentors and buddies, whatever works for each individual and their own personal development path.



“As the I&D Partner Lead of the Firm, I am acutely aware that our vision and values are built around the word ‘personal’. We are a people business dependent on brilliant client relationships. Inclusion and diversity objectives are therefore not ‘soft’ business aspirations, they are fundamental to our success”

Helen Curtis-Goulding
I&D Partner Lead

[Click here](#)

I&D at Fladgate

WELLBEING

The Firm recognises the importance of the health and wellbeing of all our people and that it can play a part in promoting an environment which allows everyone to flourish and reach their full potential.



- Bupa private medical insurance (optional benefit to join after six months' service)
- Optional dental insurance
- Eye care vouchers
- Flu jab vouchers
- Weekly personal (group) training or yoga sessions
- Gym membership and fitness activity discounts
- Cycle to work scheme
- Menopause care via Stella app



PHYSICAL HEALTH

- Employee Assistance Programme (EAP), available 24/7 and 365 days a year
- Counselling and CBT sessions available via the EAP
- Annual holiday entitlement and flexible holiday scheme, with the opportunity to buy up to an additional weeks' holiday
- Resilience and stress management training
- Mental health awareness talks and training sessions
- The option to mix office-based and home working as a regular pattern of your working week



MENTAL HEALTH

- Group personal pension and group income protection scheme
- Life assurance (5x annual salary) scheme
- Season ticket loans
- Fee-earner bonus scheme
- Client introduction bonus scheme
- Recruitment bonus
- Access to everyday lifestyle discounts, via the Vivup app
- Financial management workshops inc. mortgage and pension management



FINANCIAL HEALTH

- Sports and social events, organised by our Sports & Social Committee throughout the year inc. summer and winter parties, bowling nights and quizzes
- CSR committee and fundraising activities
- Flexible working policy
- Loyalty holiday bonus, rewarding long service
- PRIME work experience opportunities
- Student mentoring for LPC and GDL students at the University of Law



SOCIAL & CSR