

Title: Private Client Associate (NQ-6 years PQE)

Department: Private Client

Reporting to: A partner in the Private Client team which sits within the Corporate department

Chargeable hours: 1350 hours

## ROLE SPECIFICATION

### **The Private Client Team**

This is a fantastic opportunity to join a dynamic, market leading department providing innovative tax and estate planning advice to private clients.

The private client team at Fladgate holds a unique position in the market due to its extensive entrepreneurial client base.

As a member of this team you will deal with high-quality work for UHNW/HNW individuals, families and business owners, many of whom have complex business and personal interests and an international footprint.

Our tax planning and trust expertise includes:

- Structuring for those coming to or leaving the UK
- Structuring for foreign domiciliaries living in the UK
- Cross-border structuring for business deals and personal investments
- Use of double tax treaties in tax planning
- Handling enquiries from and litigation against tax authorities
- Estate administration and succession planning, both domestically and internationally

## THE ROLE / DUTIES & RESPONSIBILITIES

As an Associate in the Private Client team, your role is to provide an excellent service to clients, through solution-based advice, inspiring trust and confidence and by being actively engaged in clients' issues.

The role involves advising clients on a broad range of tax and private client matters, supporting partners and other fee earners in the private client team and regularly working alongside fee earners in the property, corporate and dispute resolution departments.

You will already have an understanding of UK and international tax law, but will be supported at all times by partners within the team to develop this knowledge and apply it to meet the needs of our clients.

You will work under Partner supervision on a broad range of matters. Duties include:

- drafting tailored tax advice and planning solutions for clients, both UK and international
- implementation of advice for clients, including liaising where necessary with other departments and overseas tax/legal counsel
- day to day management of client files from inception of a matter to completion, including scoping and quoting for new matters, keeping clients updated as a matter progresses and billing
- liaising with intermediaries on behalf of clients including bankers, financial advisers and trustees
- drafting bespoke deeds, agreements and Wills
- researching discrete areas of tax and trusts law
- supporting the real estate, corporate, litigation and finance departments with advice needed by their HNW/UHNW clients

**General Responsibilities Include:**

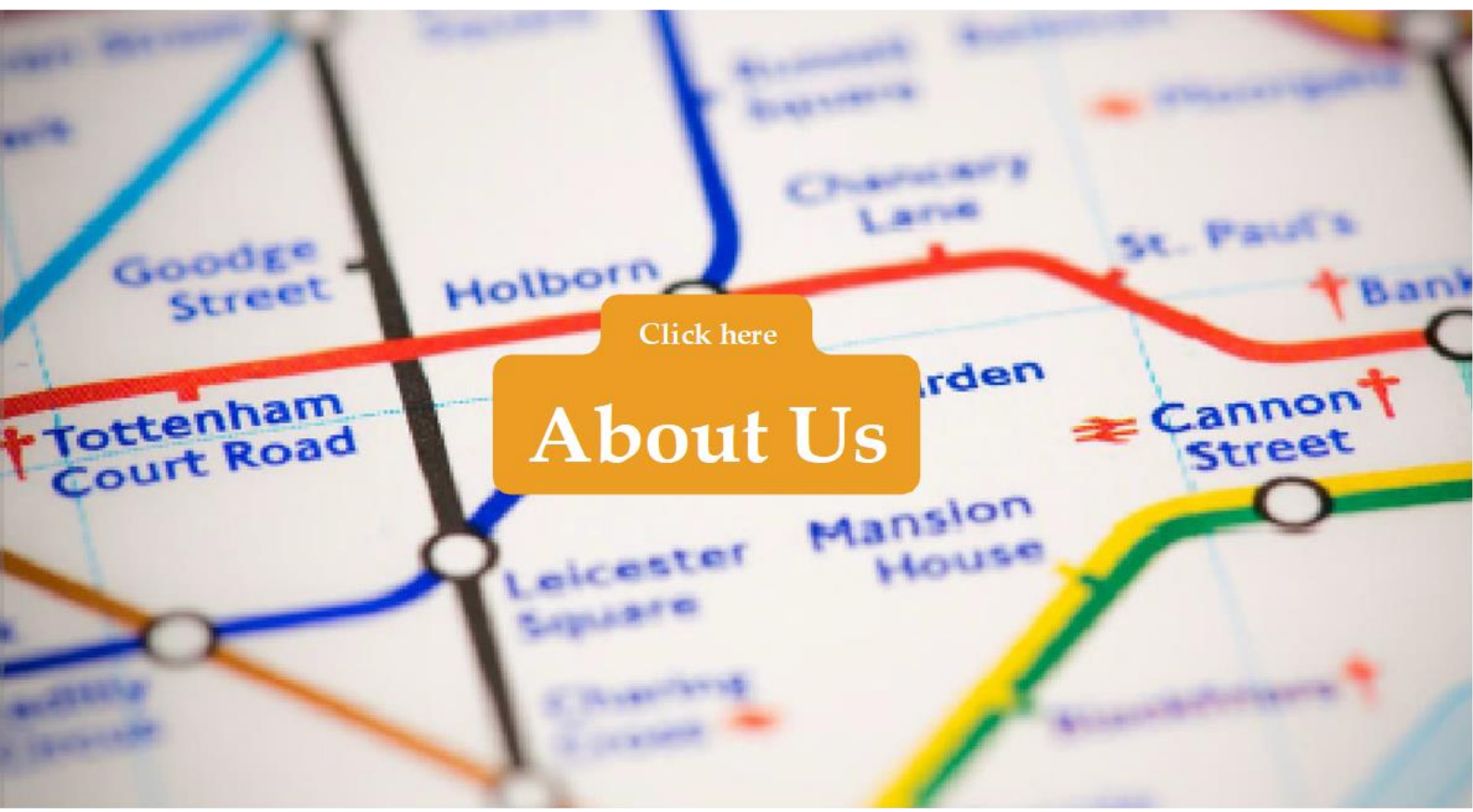
- Dealing directly with clients and taking primary responsibility for cases or specific tasks
- Taking work from a number of partners and associates and managing workload
- Drafting all documentation observing house style
- Meeting all financial targets
- Assisting in business development and marketing initiatives
- Supervising junior members of the department including paralegals and trainees where required
- Keeping up to date with developments in the law, attending training sessions (internal and external) and contributing to department training initiatives

## PERSON SPECIFICATION

We look for talented technical lawyers with the commercial expertise to manage a HNW and UHNW entrepreneurial client base. Our ideal candidate will have many of the following skills and attributes:

- confirmed admission to the roll of solicitors in England & Wales (overseas solicitors with UK experience who do not require visa sponsorship will also be considered); excellent academics;
- at least 3 years' PQE in a tax team or international private client team within private practice;
- ATT, CTA or STEP qualifications (or you will have started studying for these qualifications or be willing to do so in the near future);
- a demonstrable track record of excellent client care and direct client contact;
- a willingness to be actively involved in marketing and business development; and a flexible attitude and the ability to work effectively as part of a diverse and inclusive team.

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 will bring energy, drive and enthusiasm to this role and act as an ambassador for the Fladgate brand.



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

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At Fladgate, we recognise the importance of an agile approach, not only in the way we work with our clients, but our employees also. Flexible 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 are operating a hybrid pattern of 2 days remote and 3 days office based.





# PARENTAL LEAVE & MATERNITY POLICIES

Our aim is 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:

1. **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 1-12 and 50% of your salary in weeks 13-24. Weeks 25-39 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 6 months from the date of your return to work before providing and notice of resignation\*.
2. **Paternity** - We offer enhanced paternity pay (EPP) as full basic pay for up to 2 weeks\*.
3. **Shared Parental Leave (SPL)** - SPL allows parents to take up to 50 weeks' shared leave in total following the birth or adoption of a child\*.
4. **Adoption and Surrogacy\***
5. **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 work force** - 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 Senior Partner 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”

Sunil Sheth, Senior Partner

[Click here](#)

I&D at Fladgate



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)
- Eye test vouchers
- Optional dental insurance
- Flu jabs
- Weekly personal (group) training sessions
- Gym and sports club loans and cycle to work scheme
- Various sports teams and groups across the firm



### PHYSICAL HEALTH

- Employee Assistance Programme (EAP), available 24/7 and 365 days a year
- Counselling sessions available via the EAP where needed
- YuLife health and wellbeing app
- Annual holiday entitlement and flexible holiday scheme, and the opportunity to buy up to an additional two 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

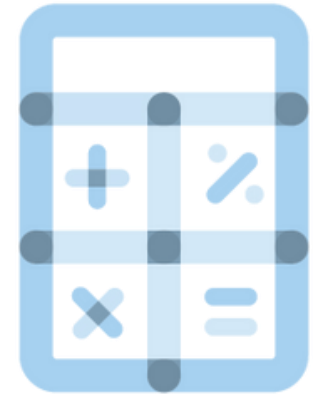


### MENTAL HEALTH

## WELLBEING

- Group personal pension and group income protection scheme
- Life assurance (4x salary) scheme
- Season ticket loans
- Fee-earner bonus scheme
- Client introduction bonus scheme
- Recruitment bonus
- Marriage / civil partnership gift
- Financial management workshops inc. mortgage and pension management

- 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



## FINANCIAL HEALTH



## SOCIAL & CSR



Corporate Social Responsibility is extremely important to the firm, and representatives from all corners of the firm ensure that we run and participate in a number of fundraising initiatives each year - such as the London Legal Walk, sponsored cycles and the occasional abseiling!

Each year we choose two charities, by firm-wide vote, to support, one local and one national. We are always looking for new CSR Committee members to come up with new ideas and initiatives to raise money.

This year, we will be partnering with the Trussell Trust and Macmillan Cancer Support.