

Job Description: Paralegal - Enable Trustee Service

Legal & Corporate Governance

August 2024



Job title	Paralegal – Enable Trustee Service
Location	Enable Scotland (Leading the Way), Legal & Corporate Governance, Inspire House, 3 Renshaw Place, Eurocentral ML1 4UF
Salary	Permanent. Up to £30,000 pro-rata, per annum (dependent on experience)
Conditions	Part time, circa 3 days per week. Hybrid working considered: Tuesdays/Thursdays office based.

About Enable

We believe in an equal society where everyone has the right to live, work and participate as active and respected citizens in the communities of their choice.

Enable, a visionary charity and leader of social care and employability support services to people with a learning disability across Scotland, is also a provider of specialist trust management services via its subsidiary Enable Trustee Service. This unique in-house role requires a Paralegal with demonstratable private client experience, preferably in trust management to join its Legal and Corporate Governance function.

The Role

The Paralegal shall have operational responsibility for the service ensuring all aspects of trust management duties and tasks are carried out in line with individual trust deed provisions and applicable legislation. The role shall be reportable to management who oversee the work parameters of this role.

Key Responsibilities

- Lead on meetings for new trusts, advising on legal and regulatory requirements,
- Manage various aspects of trust estates in line with trust law, anti-money laundering regulations, tax rules and best practice,
- Lead on trust compliance reviews and liaise with co-trustees and connected third parties as required,
- Prepare trust accounts,
- Submit trust tax returns (nil returns and cash accounts only),
- Draft required documentation for changes to trusts, appointment and resignation of trustees and minutes of agreement,
- Act as lead contact for tax agents, investment brokers and banking relationship managers,
- Act as first point of contact for new service enquiries and for existing relationships,
- Liaise with external legal advisers and agencies for new and existing trusts,
- Represent the Service at external stakeholder meetings,
- Update procedures manual, trust management documentation and information guides as required,
- Promote and raise internal and external awareness of the Service,
- Assist management with preparation of Board governance papers and attending Board meetings as required,

- Any other duties assigned by management.

Essential Criteria

- Relevant Paralegal certification with recent continuous professional development,
- Demonstrable experience in a private client, trust management or in-house legal environment,
- Strong knowledge of Scottish trust and succession laws and anti-money laundering regulations,
- Exceptional verbal and written communication, drafting and report writing skills,
- Strong analytical and numerical skills,
- Strong IT skills, in various packages, particularly Microsoft Word and Excel,

Desirable Criteria

- Access to personal vehicle to allow travelling from time to time,
- STEP Qualified (Trust and Estate Practitioner),
- Understanding of adults with incapacity and local authority/ housing legislation,
- Understanding of investments and investment risk.

Person Specification

- Excellent interpersonal and teamworking skills,
- Excellent attention to detail and strong prioritisation and organisational skills,
- Professional presentation and personality,
- Demonstrates core values of integrity, care and collaboration.
- Willingness to enhance skills and professional development.