Title: Private Client Senior Associate
Department: Corporate – Private Client
Reporting to: A Partner in the Private Client team
Chargeable Hours: 1350 Hours

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ROLE DESCRIPTION

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 expertise includes:

- Structuring for those coming to or leaving the UK, including for business owners and senior executives;
- Cross-border structuring for business deals, personal acquisitions (e.g. real estate) and investments and family wealth holding vehicles (such as companies, partnership and trusts);
- Use of double tax treaties in tax planning;
- Handling enquiries from litigation against tax authorities;
- Estate administration, succession and incapacity planning, both domestically and internationally; and
- Advising on transactions involving charities and implementing philanthropic strategies in the UK and internally.

The Role / Duties and Responsibilities

As a Senior 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 fees earners in the Private Client team and regularly working alongside fee earners in the Private Wealth, 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;
- Managing HMRC enquiries and disclosures;
- Advising on founder/management equity, employment related securities, and incentive arrangements;
- Drafting bespoke deeds, agreements and Wills
- Researching discrete areas of tax and trusts law; and
- Supporting the Private Wealth, 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
- Leading workstreams on multi-disciplinary matters with Private Wealth, Corporate, Real Estate, Finance and Disputes teams;
- 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; and
- Maintaining a working knowledge of corporate tax concepts relevant to owner managed and privately held businesses.

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 6 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 presents themselves with professionalism and polish, who will inspire the confidence of clients and colleagues.

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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

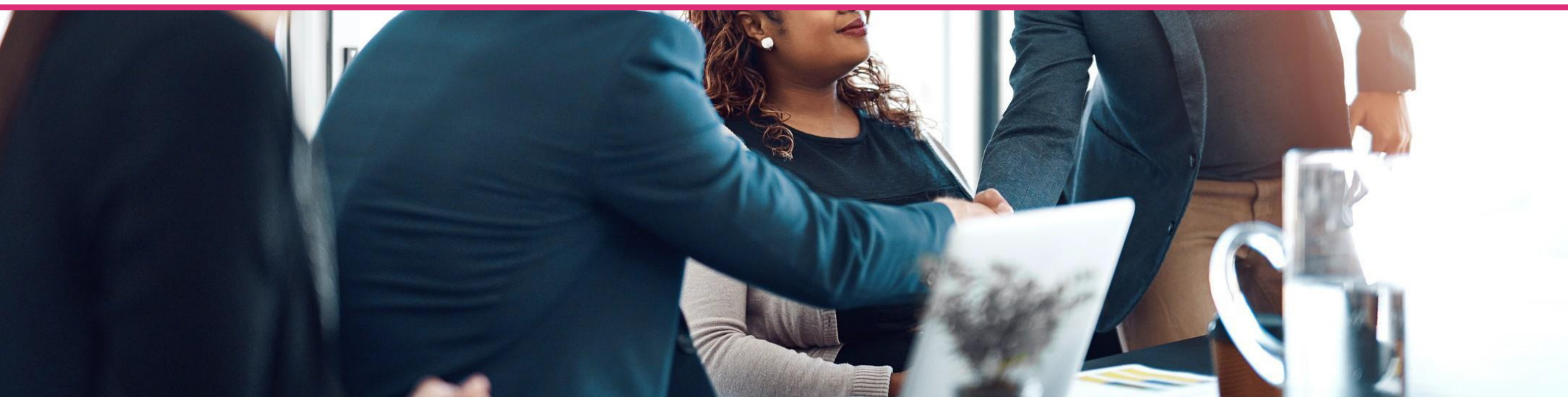
AFTER 3 MONTHS

- 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.



PARENTAL LEAVE & MATERNITY POLICIES

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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 and 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.

INCLUSION & DIVERSITY

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

Fit4Life

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