

Job Title: Trustee Services Advisor

Department: Tax and Trustee Services

Location: Ipswich or Mayfair

Salary Competitive salary plus a generous benefits package

Contractual Hours Full-Time Equivalent (37.5 hours per week)

Job Summary We are looking for a Trustee Services Advisor to join our Tax and Trustee Services team. The role will involve taking client instructions and drafting Wills and LPAs, as well as managing all aspects of estate administration.

Key accountabilities

Will Writing Service

- Writing Wills and other documents based on instructions received from clients via email, telephone or meeting (in person or via Zoom)
- Discussing instructions and queries from clients and their advisors in correspondence and at meetings. Dealing with technical correspondence as necessary.
- Maintaining records relating to Wills
- Processing Will Writing fee payments.
- Dealing with sundry queries and correspondence relating to inoperative Will appointments
- Reviews of existing wills

Lasting Powers of Attorney

- Writing LPAs based on instructions received from clients
- Discussing instructions and queries from clients, their families and advisors in correspondence and at meetings.
- To register/handle and supervise the appointment of Killik & Co Trustees Limited as Attorney under an Enduring Power of Attorney ("EPA") and all matters arising and resulting there from.
- Assisting with reviews of existing LPAs

Executorships

- To handle executorships cases at all stages from the first notification of death to the completion of administration. This will include
 - Initial meeting with family, Insuring property, appointment of solicitors and preparation of information to enable them to apply for probate, liaising with Investment Managers and Wealth Planning as appropriate, advising the
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family/beneficiaries on IHT matters, making distributions and payments to HMRC, collecting in assets, preparation of allocation statements/accounts/R185 certificates

- Ensuring good records are retained and are easily accessible
 - Creating family relationships
 - Attempting to retain assets/new business
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Competencies/skill set

- Getting things done
 - Communication & Sharing Knowledge
 - Customer Service
 - Effectiveness & Adaptability
 - Team Working
 - Knowledge of the laws surrounding wills and lasting powers of attorney Awareness of opportunities and implications of “post death” tax planning (Deeds of Variation etc).
 - Strong interpersonal skills to be able to deal with bereaved family members at a sensitive time.
 - The ability to deal with the many types of assets which can make up a deceased’s estate.
 - Keep beneficiaries, Co Executors and Trustees informed of progress (and have queries answered) orally in written form and at meetings.
 - The ability to judge between priorities of similar degrees of importance is essential
 - The ability to identify new business opportunities and how these should be progressed.
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Qualifications/experience required

Essential

- A minimum of 2 years’ experience in estate administration, including in Wills, LPA’s and Executorships
- Experience of dealing with multiple stakeholders in the administration of estates and trusts.
- Experience in communicating with beneficiaries, co-executors and trustees on the progress with the administration of an Estate or Trust.
- Have technical and accounting skills

Desirable

- A good knowledge of the software packages relating to the production of Wills
 - A desire to progress
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To apply, please email your CV and cover letter to recruitment@killik.com.

We are committed to ensuring a fair and inclusive process. If you require any reasonable adjustments under the Equality Act 2010 (for example, accessibility support or alternative formats), please let us know in advance so we can make the necessary arrangements. Your personal information will be handled in accordance with the UK GDPR and our [privacy policy](#).

Recruitment Process

At Killik & Co, we are committed to conducting a fair, consistent, and transparent recruitment process. While the structure may vary depending on the position, candidates can typically expect the following stages:

1. **CV Review** – All applications are anonymised, then assessed against the essential and desirable criteria outlined in the role profile.
2. **First Interview** – An initial conversation designed to explore your professional background, core competencies, and motivation for the role.
3. **Second Interview** – A more detailed discussion with the hiring team, which may include technical questioning, competency-based evaluation, or discussion of relevant experience.
4. **Third Interview (where applicable)** – For certain roles, an additional stage may be required, such as a presentation, case study, or meeting with senior stakeholders.
5. **Offer or Decline** – Following completion of all interviews, we will communicate the final outcome. Successful candidates will receive a formal offer subject to any required pre-employment checks.

While we endeavour to respond to all applications, this may not be possible for vacancies with high volumes of applications.