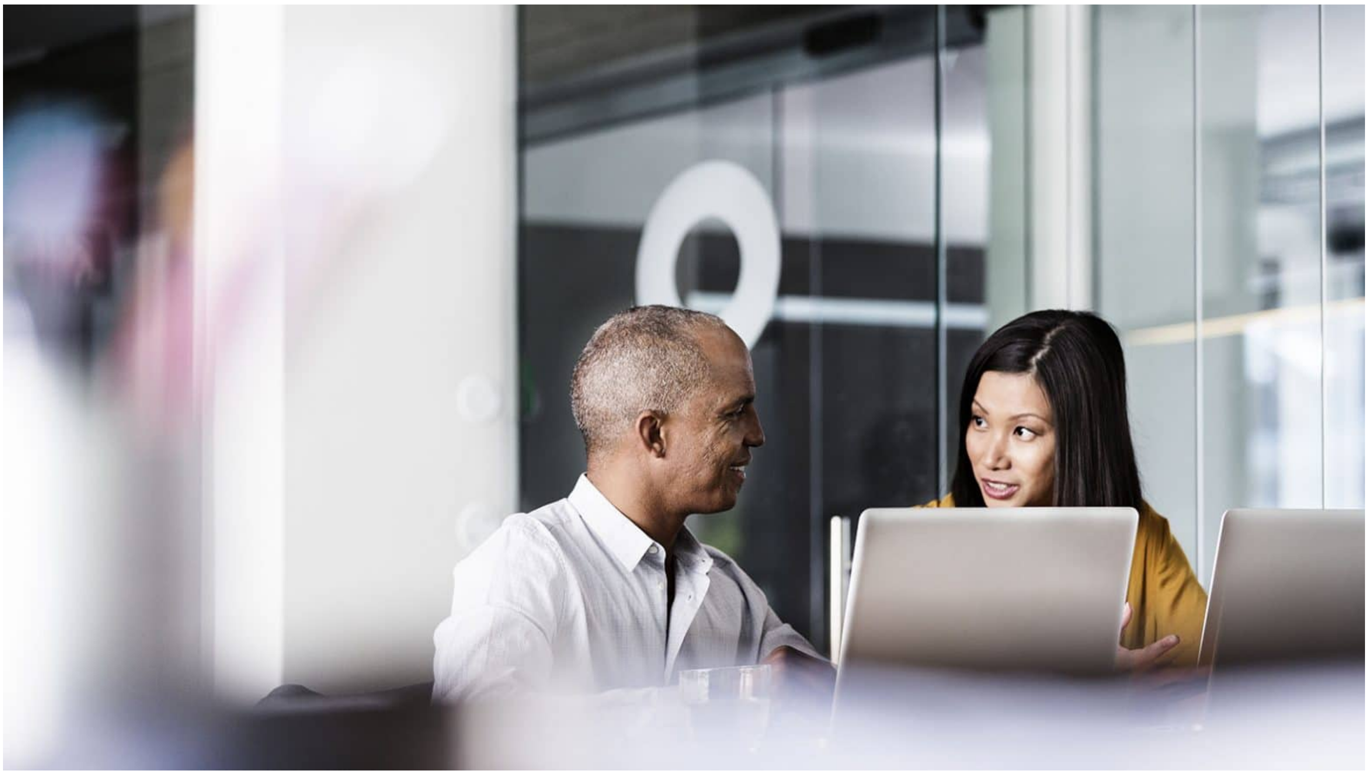
A day in the life of a trainee solicitor in private wealth



Sophie Newby lets us in on a typical day as a trainee solicitor and what she can accomplish.

Morning

7:30 am Covid Test

Due to Covid 19, trainees are working remotely three days per week, with two days per week in the office. Today is one of my days in the office. Before leaving for work I take a Covid test and send a picture of the negative result to the facilities team as a requirement of entering the office.

8:45 am Arrival at the office

I arrive at the office, make myself a cup of coffee and get ready for the day. I go over my to-do list and prioritise what tasks to focus on.

9:00 am Drafting task

I have been asked to draft a deed of appointment for a family trust. The trust is coming to an end and all of the property is being appointed out to the beneficiaries. I work through drafting the deed using our precedent document, and prepare the explanatory letter sending it to the clients.

11:00 am Remote client meeting

With my supervisor, I attend a virtual meeting with a high net worth client who wants advice on inheritance tax planning, and also wants to make a new Will and lasting powers of attorney. The client explains their priorities for planning their estate and my supervisor talks through the options for lifetime tax planning, recommending a will with a discretionary trust of residue. I prepare handwritten notes so that I can take a formal attendance note of their instructions. After the meeting, I draft a follow up email to the client requesting the further information needed to start drafting the documents.

Lunch

1:00 pm Lunch with some of the trainees

I grab a sandwich and head down to Calverley Park in Tunbridge Wells for a picnic with the other trainees who are working in the office today.

Afternoon

2:00 pm Daily catchup with my supervisor

I have a meeting with my supervisor to go through some wills I drafted last week and discuss a new task that needs to be completed by the end of the week. A client has asked for a declaration of trust to set out the ownership of their new property.

2:30 pm Lasting power of attorney

Having drafted a client's lasting powers of attorney earlier in the week for both health and care and financial decisions, I prepare a letter to the client explaining the documents. I prepare the hard copy documents to be sent out to the client with clear signing instructions.

4:30 pm Research task

Using the firm's online library resources, I do some reading and prepare a research note about indemnities and liability for retiring trustees.

5:30 pm End of the day

I leave the office and go for a run in Tunbridge Wells in the evening.

Sophie Newby

Associate