

## Self-Employed Estate Planning Consultant

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Company: Co-op

Location: United Kingdom

Category: other-general

## Self-employed Estate Planning Consultant

Uncapped commission-based earnings

Benefits including the flexibility to manage your own workload and IT equipment provided

For this role you'll need to live within an hour and a half commute of either: Swansea, Cardiff, Oxford, Reading, Essex, Norwich, Ipswich, London, Birmingham, Coventry, Buckinghamshire, Hertfordshire, Kent, Surrey, Berkshire

We're looking for experienced estate planning consultants to cover various locations across the UK. We're a fast-growing business with huge demand for our services, owing to our customer first approach and strong brand presence. If you have the skills we need, we can offer you a fantastic opportunity to work with our industry leading team.

In this role you'll discuss the benefits of our products and services with potential customers, helping them to make an informed choice about their legal planning. We'll therefore need you to demonstrate up to date experience and knowledge of key legal principles. As a self-employed consultant you'll have the flexibility to manage your own workload. Client appointments are mainly conducted through video call (national) and home visits (local).

### What you'll do

- attend appointments generated by the company
- gain referrals and self-generate at least 50% of new business
- discuss the benefits of estate planning and legal services products including Wills, LPAs, Trusts and probate services
- have the support of Co-op Legal Services, an SRA regulated business, to draft legal documents

- deliver talks and seminars arranged by the company to community groups covering later life legal products and services
- work closely with customers to identify needs and take accurate instructions to meet their needs
- capture customers instructions using our in-house Estate Planning Assistant software

**This role would suit people who have**

- proven estate planning or will writing experience trained to the standard of IPW or SWW or legally qualified through CILEX
- excellent interpersonal skills with an empathetic nature and the ability to identify customer needs
- the ability to relay complex legal information in a way customers can understand
- confidence when presenting and a natural flare for engaging an audience
- the ability to consult, influence and negotiate whilst showing enthusiasm for the product and services
- practical IT literacy in a remote setting using Microsoft Office & ability to adapt to custom software
- a full UK drivers license with access to your own vehicle

**We're actively building diverse teams and welcome applications from everyone.**

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