New Trust Caseworker

Overview

- This role supports families to set up new trusts to benefit their loved one with a learning disability by providing friendly, knowledgeable and timely guidance and casework support.

- The role guides families through their initial queries, answering questions and providing relevant information and documentation to inform the family's decision making in relation to setting up a new trust. The role then supports families to ensure that all required paperwork and onboarding checks are complete in order to establish a new MTC Trust and then register it on our internal and third party systems.

- Prior experience in casework, legal administration, wills and estates, trusts law or anti-money laundering processes would be highly desirable. Training will be provided.

What we'd love you to do

- Be the main point of contact for queries and communication around setting up a Trust with MTC. This will involve explaining how MTC trusts operate and the steps involved in setting one up effectively.

- Act as caseworker for new trusts being set up, ensuring the relevant paperwork is completed correctly and appropriate anti-money laundering checks are complete.

- Work with the Company Secretary to execute new Trust Deeds and ensure that new trusts are properly set up in our systems and registered with relevant third parties such as the Trust Registration Service.

- Take ownership of the CCH database and systems related to inactive trusts and ensure that they are kept up to date and relevant documents, post & emails are saved in the appropriate places. This will involve regular communication with inactive trusts to maintain the relationship with MTC and identify any changes.

- Be a great team player and support MTC's wider marketing, enquiries and office administration as well as undertaking ad hoc projects as required to support MTC in general.

About you

Friendly and knowledgeable you will confidently support families through the trust set up process

"We know that planning for the future and setting up a trust can be daunting for families and this role is crucial in supporting families through the process."

David, Trust Director

New Trust Caseworker

mencap

About you

Strong multi-tasker that enjoys delivering excellent customer service and support

"Your attitude and ability to demonstrate our values are as important to us as your technical skills and experience."
David, Trust Director

What you will bring

- A commitment to improving the lives of people with a learning disability

- Ability to communicate complex information in a way that is easy to understand

- Highly organised with excellent admin skills and attention to detail

- Warm, patient and helpful customer service approach

- Integrity and professionalism

- A team player with a flexible "can-do" attitude

- Confident and professional with internal and external stakeholders

- Ability to deliver accurate work under pressure and to deadlines

- Good communication and inter-personal skills, with a confidence in writing and dealing with numbers

- Commitment to building equity and inclusion

- A willingness to learn and grow professionally

Your experience

- Legal qualifications and/or experience in legal administration.

- Strong administration experience, ideally in relation to trusts or other legal process

- Casework experience of supporting people through a complex process and delivering excellent customer service

- Good IT skills including full working knowledge of Microsoft Office and CCH Central (or similar systems with a confidence to learn new IT packages)

- Experience of working well in a small team, with minimal supervision - being pro-active, finding solutions and improving things

- Experience in building effective and professional working relationships with external partners and organisations

- Experience of working in a not for profit organisation, law firm, or trust company is highly desirable

- Knowledge of trust law, wills & estate administration, anti-money laundering or compliance would be beneficial.

Who you can expect to work with

- Families of people with a learning disability and their solicitors
- The wider MTC team, MTC Board of Directors and our legal advisors
- Mencap colleagues from other teams, e.g. Wills & Trusts, IT, Governance
- External tax, trust law and investment professionals and advisors

Click here to listen to what our colleagues think

Mencap's values and how they apply to this role

We are Passionate about making the world a better place

You will be passionate about how you and your team can improve the lives of the people with a learning disability, reflecting always how you and your team can learn and improve

We are Inclusive of everyone

You will be inclusive by making sure that the MTC service supports all who use it. Within your team you will work to make sure all voices are heard and different views listened to

We are Brave we challenge and try new things

You will be brave by encouraging people to have big ideas about what would make the MTC team the best place to work and the MTC service to have the biggest impact, and you will test things out and learn from mistakes

We are Positive in our work and with each other

You will be positive in how you work with the MTC team. You will encourage each other to share your own ideas and to have honest and open conversations about what could be better

We are Kind to everyone

You will be kind and considerate in all of your interactions, and will call out any behaviour that is not, so that people feel it is a safe place to work