Job Description: Administrative Assistant - Estate Planning Support Project

Project duration: 30 days
Location: Thornton Heath, South London 3 hours per week.

Remuneration: £18 per hour

Employment status: This is a short-term self-employed contractor role. The Administrative Assistant will be responsible for their own tax, National Insurance, insurance, equipment, and compliance with applicable self-employment obligations.

Project focus: Administrative support for preparing materials related to a last will, inventory of digital assets, and funeral instructions for an individual based in England, with assets also located in the United States.

Role Purpose

The Administrative Assistant will provide organised, confidential, and detail-focused support during a short-term estate planning project. The role is to help gather, catalogue, format, and maintain information needed by the client and their legal or professional advisers when preparing a last will, digital asset inventory, and funeral instruction document. The assistant will not provide legal, tax, financial, or estate planning advice.

Key Responsibilities

- Maintain a secure project tracker showing tasks, deadlines, missing information, and follow-up actions across the 30-day project.
- Assist with gathering personal, family, executor, beneficiary, asset, liability, and contact information for review by the client and their professional advisers.
- Organise information relevant to assets in England and the United States, including property, bank accounts, investments, business interests, insurance policies, pensions, retirement accounts, and other estate-related records.
- Create and maintain a structured inventory of digital assets, including online financial accounts, cryptocurrency or digital wallets, domain names, cloud storage, email accounts, social media accounts, subscription services, loyalty accounts, and digital media libraries.

- Record high-level access instructions without storing passwords, recovery phrases, private keys, two-factor authentication codes, or other sensitive credentials in unsecured documents.
- Compile funeral instruction preferences, including burial or cremation wishes, service preferences, readings, music, charitable donations, obituary details, and key contacts.
- Prepare clean drafts, schedules, checklists, and summaries for review by the client, solicitor, tax adviser, financial adviser, or other authorised professionals.
- Coordinate appointments, reminders, and document requests with relevant advisers, including professionals in England and, where needed, advisers familiar with United States assets.
- Maintain accurate file naming, version control, and secure storage of project materials.
- Flag gaps, inconsistencies, or unclear information for the client or adviser to resolve, without interpreting legal effect or making recommendations.

Skills

- Proficient with Microsoft 365 and Copilot
- Proficient with Microsoft OneDrive

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