

CRITERIA TO BE APPLIED (Excellence in Client Service – Private Clients):

Summary:

This award is available to teams that can demonstrate a significant contribution to the private clients of their firm. That could be a particular project/work done for a private client in 2019 or commitment to excellence in serving private clients over a longer period of time. The judges will be looking for a team that has worked together to produce an outstanding outcome for their private client(s) and has shown high standards of skill, professionalism and dedication in so doing. Nominees will be expected to provide examples of work they cite in support of their application (names and client details will be kept confidential) and may be asked to provide client references. The award is open to teams providing advice to individuals and trusts in relation to their personal, family or other non-business affairs.

Instructions on preparing your application.

- I. Do not exceed the word limit. Any words over the stipulated limit will not be read/or considered.*
- II. Do not supply any additional information/material as it will not be considered.*
- III. Your application will only be assessed on the text you provide so please do take time and care when preparing your text. The marking criteria for this award are available on the Birmingham Law Society website. We recommend that you are mindful of the criteria when preparing your submission.*
- IV. Please provide your application typed up on an A4 size paper ensuring at the top of the document you have inserted:*
 - *Name of Firm/Organisation*
 - *Address of Firm/Organisation*
 - *Contact Details of Person preparing Application on behalf of the team*
- V. Please ensure that you, as the nominated candidate, prepare this document.*
- VI. The shortlist will be announced at the beginning of February. If you are shortlisted you will be invited to attend a 20-minute interview between **Monday 9 March and Thursday 12 March 2020**. A date and time will be allocated in February 2020. **(due to a very tight schedule, please note the interview time allocated will be fixed and therefore no alterations to the allocated slot can be requested.)***

Please in no more than 1200 words, outline why you should be considered for this category in line with the summary above. You might like to consider some or all of the following:

- Provide brief details of the team, e.g. how many members, names of key individuals, levels of qualification, specialism etc. Please only provide details of fee earners permanently based in West Midlands if your office/team/firm is spread across multiple locations.
- Outline the team's development and progress in 2019. You may include any significant changes to the team, evidence of team working, examples of any pro bono etc. work undertaken by the team/team members, any client satisfaction/feedback, any external listings/awards and how the team and/or the work undertaken by the team has benefited the local and/or wider economy.

- Describe the nature and type of work undertaken in 2019 which you feel best illustrates the team's expertise, specialism and strength in this type of work - please feel free to anonymise cases /work that are not in the public domain.
- Detail at least one highlight of your team's Private Client Work this year of which you are particularly proud.
- Give an example of something that your Private Client Team has done which you feel shows initiative and innovative thinking in client service.
- Describe the ethos of the team and details of staff development and/or wellbeing initiatives.
- Describe how do you see the Private Client Team developing in 2020 and beyond.

Please include the total word count at the end of your submission.

DECLARATION:

I confirm that I believe the contents and word counts detailed within this application are true.

Date:

Signature: