



## **Finance Officer**

**AB0102**  
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**Managing Director**  
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# Welcome from Fran Gillon, Chief Executive

Dear Candidate,

I am delighted that you have expressed an interest in applying to be our Finance Officer. I hope this candidate brief gives you all the information you need about the requirements of this role. You can also find more information about us on our website: <https://ipreg.org.uk/>. Our ambition is to be a regulator that patent and trade mark attorneys are proud to be regulated by.

This is an exciting time to be part of legal services regulation – and the intellectual property sector (IP) in particular which will play a key role in the UK's future economic success. We work on a variety of different regulatory projects and are just starting a major review of our education requirements. We also undertake investigations into complaints and can take disciplinary action against attorneys.

We are a small team of 7 members of staff, most of whom work part time. We also have a Board of 9 Directors, chaired by Lord Smith of Finsbury. Our annual budget is ~£1.2m, most of which is funded by practising fees paid by attorneys and their employers. More information about our finances is also on the [website](#).

We want to recruit a highly motivated and self-sufficient Finance Officer who can work on their own initiative (you will be the only person on the team who has a specific finance role). We are introducing some exciting changes to some aspects of the finance work including outsourcing payroll provision, integrating expenses claims and automating invoice processing. You will have the opportunity to play a key part in driving efficiency through those changes. Of course, you will also be responsible for keeping track of our finances using QuickBooks Online and will play a key role in the collection of practising fees each year through our CRM.

If this is a role that interests you, we would very much like to receive your application. You can find all the details on how to apply further along in this brief. If you have any further questions about the role once you have read this candidate brief please contact Thewlis Graham via email: [applications@thewlisgraham.com](mailto:applications@thewlisgraham.com) for a confidential conversation with Sarah Thewlis.

Yours faithfully

Fran Gillon  
**Chief Executive**

# About the Intellectual Property Regulation Board

The Legal Services Act 2007 (LSA) requires those involved in the regulation of legal services to separate the representative activities of their professional bodies from their regulatory functions.

The Chartered Institute of Patent Attorneys (CIPA) and the Chartered Institute of Trade Mark Attorneys (CITMA) are the representative bodies of patent attorneys and trade mark attorneys respectively. They are also approved regulators under the LSA. In order to separate their representative functions from their regulatory functions, CIPA and CITMA have delegated their respective regulatory functions to the Patent Regulation Board (PRB) and the Trade Mark Regulation Board (TRB); the PRB and the TRB may (and usually do) sit jointly as the IPReg Board. The Board comprises five lay members (including the Chair), two patent attorneys and two trade mark attorneys.

IPReg regulates around 3,440 individual attorneys (of whom around 70% are patent attorneys, 24% are trade mark attorneys and 6% are on both registers). We also regulate around 250 firms.

Reflecting on the progress made in achieving its initial strategic priorities, the new strategic priorities were "re-cast" by the Board in November 2023 to the following:

## A. Users of IP legal services and the public

Strategic priority: To improve consumer knowledge and empowerment among users of IP legal services.

*We will do this by:*

- Increasing the public profile of IPReg to the regulated community and users of IP legal services.
- Increasing our understanding of the needs and expectations of users of IP legal services.
- Providing targeted and proportionate information to enable those users to make informed choices about their legal adviser.
- Increasing our understanding of the needs and expectations of all types of regulated attorneys/firms and disseminating information about best practice.

## B. The profession (current and future)

Strategic priority: Setting, promoting and enforcing high quality education and professional standards for entry to the professions.

*We will do this by:*

- Using data and insights from our regulatory activity to influence the future of the profession in a way that ensures that appropriate standards are maintained and routes to entry onto the registers are varied and fit for purpose.
- Encouraging an increase in the good quality providers of qualification pathways and examinations in particular as a tool to increase the diversity of the trade mark and patent attorney professions.
- Gathering data about the diversity of the profession (attorneys and students) to inform our decision making.

## C. IPReg

Strategic priority: Carrying out our regulatory activities proactively, effectively and inclusively, ensuring the efficient use of resources.

*We will do this by:*

- Building our capacity to understand and respond to global and market trends (including the use of technology) that impact on intellectual property matters, the wider environment and our approach to regulation.
- Acting quickly and consistently when we identify potential breaches of regulatory requirements and conducting investigations efficiently and effectively.
- Encouraging innovation and competition in the provision of regulated IP legal services.

Some of the matters that we are responsible for include:

- Setting and enforcing our Core Regulatory Framework. You can find all the new regulatory arrangements and accompanying guidance on our [dedicated webpage](#);
- Setting the education and training requirements for qualification as a patent attorney and as a trade mark attorney;
- Maintaining the registers of patent attorneys and trade mark attorneys;
- Setting the requirements for continuing professional development in order that patent attorneys' and trade mark attorneys' knowledge, skills and expertise are maintained at a high level;
- Investigating complaints of misconduct and, where appropriate, taking disciplinary or other action.

## **Our Business Plan**

Download a copy of our [2024/25 Business Plan](#).

# Job Description and Person Specification of the Finance Officer

## Job Purpose

- To be the finance officer for IPREG, ensuring that the senior team and Board have accurate information to inform their operational and strategic decision making.
- To be responsible for processing IPREG financial resources efficiently and produces accounts that meet statutory requirements.

## Key tasks

1. Keeping all necessary up to date and accurate financial and accounting records for IPReg Limited, including processing invoices.
2. Updating and monitoring payroll provision (Board and Team), expenses, and fee payment systems by external provider and dealing with associated enquiries.
3. Checking expense claims from Board and Team members via external provider.
4. Budget planning/monitoring including drafting practising fee applications to the LSB using standard templates.
5. Payment of invoices and bills – on CEO's authorisation.
6. Liaison with external auditors and filing accounts at Companies House.
7. Liaison with banks and payment provider.
8. Assisting with the annual re-registration process including finance functions on the CRM.
9. Answering enquiries from external parties.
10. Identifying opportunities for efficiencies in the finance functions and making recommendations to the CEO.
11. Other matters as requested.

## Person Specification

- CCAB Accountancy Qualification.
- Experience in compliance, governance and internal control.
- Experience of invoice and expense processing.
- Experience of payroll.
- Provision of finance reports.
- Excellent IT skills.

# Other Information

## **Diversity and equality of opportunity**

We welcome applications for these posts from all sections of the community and from people with diverse experience and backgrounds.

IPReg is committed to the principle of appointments on merit with independent assessments, openness and transparency of process and to providing equal opportunities for all, irrespective of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation.

## **Conflict of Interests**

You should note particularly the requirement to declare any conflict of interest that arise in the course of IPReg business and the need to declare any relevant business interests, positions of authority or other connections with organisations relevant to the business of IPReg.

# Salary, Location and Benefits

**Salary:** £55k full time plus benefits.

**Location:** UK, London and hybrid.

**Contract:** Permanent contract on a part-time basis, hybrid working 3 days per week.

## Benefits:

- A full time employee is entitled to 25 days paid holiday a year and 8 bank holidays: 33 days. If a bank holiday falls on a day the employee normally works, they must take that day as annual leave unless otherwise agreed with the Chief Executive. We close the office from the end of the last working day before Christmas until the first working day of the New Year without the need to use any annual leave allowance. Part time employees' annual leave entitlement is pro-rated;
- Life Insurance - 4 x basic salary;
- Pension - IPReg has set up a [Nest](#) workplace pension scheme and pays the statutory minimum contribution for qualifying earnings (between £6,240 and £50,270);
- Company Sick Pay - after 12 months continuous service: full basic salary for up to 6 weeks' absence followed by 75% of the basic salary for up to a further 7 weeks' absence in any rolling 12-month period. When this entitlement is exhausted, the staff member will not qualify for Company Sick Pay until they have returned to work and worked a total of 26 weeks. For staff on permanent contracts, there is an income protection plan which pays up to 75% of the basic salary for 2 years after they have been off sick for 13 weeks as a result of the same illness;
- Health cash plan - provides cashback on essential healthcare and access to health and wellbeing services.

*If you have read all this information and still have a query, for a confidential conversation with Sarah Thewlis, Managing Director of Thewlis Graham Associates, please contact us on 0207 850 4781 or email [applications@thewlisgraham.com](mailto:applications@thewlisgraham.com).*



# Timeline, Application process and How to apply

## Timeline

Date	Activity
17 February 2025 12 noon	Applications close.
18 February onwards	Thewlis Graham consultant interviewing of interested candidates – online.
26/27 February	IPReg interviews – online.

## Application Process

Thewlis Graham Associates will acknowledge all applications. These will be assessed against the criteria in the Role and Responsibilities sections and Person Specification and the people who best meet these will be invited for interview with Thewlis Graham Associates. These will be held online.

Those candidates not invited to interview will be advised by email.

Longlisted candidates will also be advised by email. After a consultation between the IPReg and Thewlis Graham Associates, a shortlist will be drawn up and shortlisted candidates invited for interview with the recruitment panel. These will be online also. All candidates will be informed of the outcome following this date.

## How to Apply

To apply for this position, please complete the three steps below, emailing your documentation to [applications@thewlisgraham.com](mailto:applications@thewlisgraham.com) quoting reference ABO102.

1. Your CV in Word format only.
2. Your covering letter in Word format only, to cover the following points:
  - Your reasons as to why you would consider yourself suitable for this role, and why you are interested in the role.
  - Your current remunerations details and notice period and the name, job title, organisation, email address and mobile number of two professional referees. (Please note referees will not be approached without your prior permission).
  - Please keep the letter to a maximum of three pages in total.
3. Please complete the Diversity Monitoring form, please see link below.

**Please ensure that you include your mobile phone number and email address in your application.** Do not hesitate to contact Sarah Thewlis on 020 7850 4781 or email [sat@thewlisgraham.com](mailto:sat@thewlisgraham.com) if you have any queries.

**If you would prefer to receive this candidate brief in a more accessible format, please contact us.**

# Diversity and Inclusion Monitoring

Diversity and Inclusion Monitoring is independent of the recruitment process but please do complete your form as Thewlis Graham Associates is committed to monitoring and analysing diversity and inclusion information so that we can ensure that our processes are fair, transparent, promote equality of opportunity for all, and do not have an adverse impact on any particular group.

The link to this form is here: [click here](#). If you have any problems with this, please contact Lizzy on: [ln@thewlisgraham.com](mailto:ln@thewlisgraham.com).

Any information provided on this form will be treated as strictly confidential and will be used for statistical purposes only. It will not be seen by anybody directly involved in the selection process. No information will be published or used in any way which allows any individual to be identified.

Thank you

# Contact Us

## Thewlis Graham Associates

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