

JOB DESCRIPTION

JOB TITLE: Family Wealth Planning/Tax Legal Secretary

FLSA STATUS: Full Time, Non-Exempt

REPORTS TO: Assigned Attorneys and Paralegals

SUMMARY:

Maintains close contact with attorneys, paralegals and clients to perform a variety of advanced secretarial duties including preparing estate planning, trust administration/probate and other related documents. Possess excellent organizational, written/verbal communication and time management skills. Establish and maintain calendar and deadline reminder systems to ensure that deadlines are met, and information and material requiring signatures are received and recorded on a timely basis. Observes confidentiality of all legal documents and firm matters.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Draft correspondence with regard to clients and various regulatory agencies as well as preparation of executed documents with minimum supervision and instruction.
- Perform broad range of clerical duties which require knowledge of procedures and specialized terminology.
- Maintain attorney calendar and travel arrangements.
- Use discretion and good judgment when contacting clients.
- Process incoming mail, enter attorney time on system, and prepare expense reports.
- Organize and coordinate meetings and conferences.
- Assume responsibility for special projects, including paralegal tasks.
- Provide administrative and overflow support.

ESSENTIAL COMPETENCIES AND SKILLS:

- Proficient in Microsoft Office Suite, efilng and DOCUSIGN.
- Familiarity with attorney-client relationships & estate planning and execution process.
- Familiarity with recorder, assessor, and probate court.
- Notary or willingness to become a notary.
- Ability to work flexibly and proactively with minimal supervision.
- Detail oriented, professional attitude, reliable, well organized.
- Desire to learn and cross-train in various different departments' secretarial functions.
- Superior communication skills.
- Ability to meet deadlines and follow through on assigned tasks.

- Good discretion and judgment and observance of confidential nature of all legal documents.
- Integrate with and support the entire Family Wealth Planning team.
- Ability to type 60 wpm and be able to transcribe dictations and telephone messages.
- Proofread documents to ensure quality and accuracy.
- Photocopy, and mail/messenger/Fed-Ex Documents.
- Strong problem solving and multitasking skills to ensure documents are timely filed.
- Self-Starter with common sense and good initiative with strong secretarial and organizational skills.
- Willingness to assist and cooperate with others.
- Flexible with assignments and changing priorities and willingness to work overtime as required.

REQUIRED EDUCATION AND EXPERIENCE:

- Minimum of four years of law firm secretarial experience required. Secretarial experience in estate planning and/or tax preferred.
- High School diploma or equivalent required.

SUPERVISORY RESPONSIBILITY: None

SALARY RANGE: The anticipated hourly salary wage range the Firm reasonably expects to pay candidates for the position of \$46.70 to \$63.19 (\$85,000 to \$115,000 annually). The final annual salary wage offered to a successful candidate will be dependent on several factors that may include but are not limited to the type and years of experience in the job, type and years of experience in the industry, education, and other factors.

WORKING CONDITIONS: Normal office environment with little exposure to excessive noise, dust, temperature and the like.

POSITION TYPE/EXPECTED HOURS OF WORK: This is a full-time position with four days in-house required. Days and hours of work are Monday through Friday, 9:00 a.m. to 5:00 p.m. Evening and weekend work may be required as job duties demand. This is a non-exempt position under the Fair Labor Standards Act.

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

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