

ROBINSON PAYNE LLC

Position: Estate Planning Legal Assistant

Hours: Non-Exempt, Full-Time, 40hrs/week

Principle Duties & Responsibilities

- **Manage and Execute the Funding Process of Trusts**
 - Receive funding recommendations directly from Attorney
 - Create Excel spreadsheet with Trust Allocations
 - Draft Funding Engagement Letter
 - Obtain necessary documents from client, companies and/or financial advisor
 - Complete funding documents
 - Forward & follow up funding documents to companies/recorder
 - Copy and forward set to clients
 - Docket in calendar for review at 1, 3, & 5 years and prep and advise attorneys at each juncture

- **Provide Administrative Support to the Estate Planning Process**
 - Scan original signed copies and burn CD of same; copy complete set for files; file electronic documents; prepare binder for client
 - Forward documents to client
 - Input, monitor and maintain tickler for return of signed receipt

- **Provide Administrative Support to the Estate Planning Team**
 - Proactively monitor and assist with follow up of departmental deadlines
 - Assist with recordkeeping and filing systems within the EP department
 - Assist with preparation of Word Bills for EP Signings
 - Perform general clerical and administrative EP duties including:
 - Preparing correspondence, letters, memos, faxes, mailing, etc.
 - Perform other duties and responsibilities as assigned by EP Paralegal and/or EP Attorney

Education/Experience

Bachelor's degree and/or specialized certification preferred, but not required
Minimum 3-5 years prior legal experience in Estate Planning/Funding
Proficient in Microsoft Office Applications
Experience with application TimeMatters a plus, but not required

Skills

Ability to organize and prioritize a variety of work in an efficient and detailed manner
Strong communication skills – both verbal and written
Tact and diplomacy in dealing with clients/sponsors/financial advisors
Ability to keep information confidential
Ability to work independently and proceed with objectives without supervision
Proper phone etiquette
Professional appearance and attitude

Relationships

As we are a small firm, it is important that positive relationships are maintained with all team members. Direct supervision of this position will be provided by the Estate Planning Paralegal.