

## **Trusts & Estates Legal Secretary/Paralegal, Reno, NV**

Our client is seeking a Legal Secretary/Paralegal to join their Trusts & Estates Practice Group.

The Trusts & Estates Legal Secretary/Paralegal will assist senior partners in the preparation and revision of trusts, wills and other related estate planning documents. In addition, the position will be responsible for administrative duties, including, but not limited to, answering phones, maintaining client files, managing a high volume of mail and other correspondence, managing attorneys' calendars, travel itineraries and processing expense reports.

### **Duties and Responsibilities:**

- Assist in the formation and operation of family trust companies.
- Revise and redline correspondence, trusts, wills, partnership agreements, pleadings, corporate agreements, tax petitions and correspondence.
- Assist in drafting legal documents, including wills, trusts, powers of attorney and advance health care directives.
- Assist in the preparation of contracts, business agreements, operating agreements and partnership agreements.
- Facilitate the transfer of assets and stock certificates to beneficiaries of trusts and estates.
- Obtain Federal Tax ID EIN number for trusts and estates.
- Assist in the formation of legal entities and related documentation.
- Gather information and prepare materials for filing 706 estate tax returns, income tax returns and fiduciary income tax returns for decedents.
- Calendar quarterly income tax payments for trusts and estates.
- File forms related to non-profit organizations.
- File petitions for probate, trust-related documents, pleadings and declarations with applicable courts.
- Prepare engagement letters and new matter reports for new clients.
- Anticipate clients and attorneys' needs, organize and set up meetings and appointments in a timely fashion, update files and provide daily calendar reminders of all scheduled meetings, court hearings and appointments. Coordinate with attorneys as to time, location and participants associated with meetings and make travel arrangements.
- Obtain files for review by attorney prior to meeting with clients. Prepare and update binders with executed estate planning documents. Scan all executed estate planning documents to the electronic file system and send original documents to the vault.
- Manage incoming and outgoing calls for attorneys.

### **Skills and Qualifications:**

- Working proficiency in Adobe and Windows-based software including Microsoft Office Suite products (Word, Excel, PowerPoint, Outlook).
- Excellent proofreading, editing and formatting skills.
- Exemplary organizational and time management skills.
- Strong attention to detail.

- Excellent client service skills.
- Strong verbal and written communication skills.
- Ability to work well under pressure, multi-task, and set priorities while meeting deadlines in a fast-paced environment.
- Team player with a positive attitude.
- Ability to effectively interface with clients, client representatives, outside counsel and others.
- Discretion in handling sensitive and confidential information.

**Education and Experience:**

- High school diploma or equivalent required.
- Bachelor's degree in related field such as paralegal studies, business administration, or a relevant discipline is a plus.
- Paralegal certificate is required.
- Minimum of 5 years' legal support experience is required; experience with trust and estate planning for high net worth clients is preferred

Full time position, onsite, M-F

Competitive salary based on experience with excellent benefits, bonus potential, 401k, profit sharing and more!