TRUSTS & ESTATES/REAL ESTATE PARALEGAL

This Brunswick-based paralegal position is part of the Firm's Trusts & Estates and Real Estate practice. Reporting to the attorneys in the Estate Planning and Real Estate Practice Groups and ultimately the supervising attorney, the Trusts & Estates and Real Estate Paralegal will assist with all phases of estate settlement and administration, which involves interaction with attorneys, fiduciaries, and beneficiaries. This position will serve as primary client contact for estate administration matters and liaison between Personal Representative clients and the responsible attorney(s). The Real Estate Paralegal will assist with all phases of the transfer, sale, purchase and financing of real estate from the initial agreement through and after the closing,

Specific trusts & estates responsibilities include the following: meeting with clients (with responsible attorney) during initial conference; preparing probate filings (e.g. applications for informally probated estates, guardianships, notices of appointment of domiciliary foreign personal representatives, etc.) as well as more complicated filings; notifying client of appointment as Personal Representative; notifying heirs and beneficiaries of Personal Representative's appointment; developing inventories and maintaining fiduciary accountings for estates and trusts; obtaining necessary appraisals and asset valuations; maintaining all probate matters and cases in EstateWorksTM probate software on a current, day-to-day basis; preparing cash forecasts, asset distribution plans, asset liquidation and/or distribution documentation and coordination of the same, and initial drafts of federal and state estate tax returns; assisting with audits; accounting of estate transactions; timely filing of fiduciary income tax returns and final personal income tax returns; corresponding with clients/beneficiaries/others as necessary (for attorney or paralegal to sign); preparing other relevant forms for filing in the Probate Court; and preparing routine correspondence pertaining to administration (notices of appointment, DoD letters, etc.).

Specific real estate responsibilities include the following: scheduling and tracking of real estate closing activity; preparing documents used in real estate transactions, including loan documents, corporate resolutions, discharges, purchase and sale agreements, deeds, leases, closing statements, etc.; reviewing of due diligence documentation and closing binders; performing title updates (online) and basic title research; facilitating production of title insurance binders, commitments, endorsements and policies when required; organizing and documenting project information and coordinating the efforts of others involved in a project, i.e. lender, surveyor, brokers, and attorneys; communicating with clients, real estate agents, service providers, and other parties to gather information necessary to complete the accurate documentation and closing of a project in a timely fashion and to inform them of scheduling, and closing requirements, and other related matters; using Title Express or other real estate closing software; facilitating closings, preparing the agenda, overseeing documents and proper execution, resolution of problems that may arise, and acting as notary when required, print checks for closing and make bank deposits and/or wire transfers; reviewing pre-bills and prepare timely manual bills to be presented and paid for closing; coordinating post-closing matters such as recording of documents, following up on mortgage discharges and issuing of title insurance policies; work with assistants to manage file contents, pleadings and correspondence and be responsible for retirement and data entry into archiving database.

An Associate's degree in a relevant field plus relevant experience required. Bachelor's degree accounting, applied math, or related field is preferred. The ideal candidate will also possess the following: ability to relate to, and communicate with, clients and families in mourning; ability to work cooperatively with other individuals of all personality types and as a part of a cohesive team; law firm, tax preparation, or fiduciary accounting experience; strong problem solving skills; ability to work independently with only a modest amount of day-to-day supervision; ability to be respectfully of appropriate day-to-day supervision by responsible attorney; high degree of attention to detail and accuracy in work product; strong writing and proofreading skills; strong ability to manage multiple projects; excellent interpersonal and communication skills; familiarity with technology, including the use of the Internet, as well as office telephones, copiers and computers; ability to follow instructions; commitment to maintaining confidentiality of client and Firm information; and proficiency with Microsoft Word, Outlook and Excel; knowledge of bookkeeping software is a plus.

Competitive compensation and benefit package offered. Flexible Benefits Plan includes employee group health, dental, life, short-term and long-term disability insurance, medical and dependent care reimbursement plans, health savings account, and long-term care insurance. In addition, the Firm provides a generous 401k plan and paid leave policy.

Please submit résumé and professional references in confidence by December 19, 2016, to:

Human Resources, Eaton Peabody
PO Box 1210
Bangor, Maine 04402-1210
or
tbrown@eatonpeabody.com

No phone calls or walk-ins please - Equal Opportunity Employer