

Trusts & Estates Administrator Bangor, Maine

Eaton Peabody is seeking an experienced Trusts & Estates Administrator to become an integral part of our growing Trusts & Estates team. Reporting to the attorneys in the Estate Planning Department and ultimately the Department Chair, the Trusts & Estates Administrator 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).

Specific duties and responsibilities are as follows: meet with clients (with responsible attorney) during initial conference; prepare 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; notify client of appointment as Personal Representative; notify heirs and beneficiaries of Personal Representative's appointment; develop inventories and maintain fiduciary accountings for estates and trusts; obtain necessary appraisals and asset valuations; prepare cash forecasts, including estate tax liability information; asset distribution plans; asset liquidation and/or distribution documentation and coordination of the same; initial drafts of federal and state estate tax returns including Forms 706, pro forma 706, 706MEs and 706ME-EZs, and assisting with audits; accounting of estate transactions; fiduciary income tax returns and final personal income tax returns; correspondence to clients/beneficiaries/others as necessary (for attorney or paralegal to sign); other relevant forms for filing in the Probate Court; prepare routine correspondence pertaining to administration (notices of appointment, DoD letters, etc.); all other duties and projects that may be assigned.

Applicants must meet the following qualifications: ability to work cooperatively with other individuals of all personality types and as a part of a cohesive team; four year degree in accounting, applied math, or related field; 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; 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; 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, health savings account with employer contribution, dental, life and LTD insurance, medical and dependent care reimbursement plans, as well as long-term care insurance. In addition, the firm provides a generous 401k plan and leave policy.

Please submit resume and professional references in confidence to:

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

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