



## **POSITION DESCRIPTION**

LEGAL ASSISTANT

### **PRACTICE GROUP: TRUSTS & ESTATES POSITION DESCRIPTION SUMMARY**

Reporting to attorneys, this non-exempt position assists with document preparation, routine client communication, word processing, drafting of work product, and general assistance as needed. Additionally, the Legal Assistant may provide support to other employees on an as needed basis.

### **SPECIFIC DUTIES AND RESPONSIBILITIES**

- Strict adherence to attorney ethical guidelines and maintenance of confidentiality with respect to firm clients and firm business operations
- Word processing, transcribing, taking dictation, editing, copying
- Organizing and preparing documents, information packets, presentations, exhibits
- Coordinating monthly billing for assigned attorneys (including circulation and monitoring of review pre-bills by other attorneys and paralegals within the firm)
- Drafting of work product such as letters, wills, trusts, powers of attorney, advance health-care directives, memoranda and other legal documents
- Organizing and coordinating attorney calendar and workflow
- Initiating and responding to telephone calls, handling mail, drafting responses to correspondence
- Reviewing and editing attorneys' time entries, and other related work
- Coordinating travel arrangements for attorneys; arranging and keeping records of attorneys' CLE sessions
- Checking for client conflicts, opening new matters, creating and maintaining standardized case files, retiring files
- Scheduling and making all necessary arrangements for meetings, calls, conferences with clients and others; meeting with clients, collecting information
- Maintaining an electronic docket/tickler system; appropriate follow up with attorneys regarding pending matters and deadlines
- Doing time entry for work performed when appropriate
- Work product and conduct consistent with firm values, policies and procedures
- Using the following computer programs: Microsoft Office (Word, Excel, PowerPoint), Worldox, Aderant, File room database, PDF Docs, PDF Form Filler, Ecco, ShoreTel
- Various office support tasks such as filing, assisting with time-sensitive projects in order to meet deadlines, general telephone coverage, office appearance, general reception, and front-desk work
- Other duties and projects as assigned

### **PRACTICE GROUP SPECIFIC DUTIES AND RESPONSIBILITIES**

- Supporting Fiduciary Committee
- Drafting estate planning documents
- Maintaining tickler/task system for estate planning activities
- Maintaining client wills database
- Organizing and maintaining contents of Firm's safes or safe deposit boxes holding original estate planning documents

### **QUALIFICATIONS SUMMARY**

- A high-school diploma or equivalent is required
- An advanced degree or formal education or certification in legal, paralegal, or related studies, is preferred
- High degree of accuracy and thoroughness in work product
- Good written, oral communication, proofreading and interpersonal skills
- Strong English language skills
- Skilled in the use of modern office equipment and computer technology
- Demonstrated ability to handle work efficiently and confidentially
- Ability to be productive in a fast-paced environment and to work under pressure
- Timeliness and ability to meet deadlines
- Temperament conducive to collaborative team work and work with employees at all levels
- Proficiency with Microsoft Office suite; experience with pdfDocs is a plus;
- Ability to follow instructions and to ask questions when instructions are unclear.

### **PHYSICAL DEMANDS**

*The physical demands and work environment described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Work involves walking, talking, hearing, using hands to handle, feel or operate objects, tools, controls, a mouse and key board, and reaching with hands and arms. Vision abilities required by this job include close vision and the ability to adjust focus.

This position requires the employee to work scheduled hours as determined by the firm. Attendance and punctuality are required.

The employee may be required to push, pull, lift, and/or carry up boxes containing exhibits or other legal documents weighing up to 30 pounds. The noise level in the work environment is usually moderately quiet.

This position description is not designed to contain a comprehensive listing of activities, duties, or responsibilities as required of the employee for this job. It is subject to change at any time at the discretion of the firm.

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Employee

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Date