

POSITION DESCRIPTION

Legal Assistant

Department: Family Wealth & Estate Planning

Location: Rochester

Classification: Nonexempt

Reports to: Partners and Associates

Company Overview:

It is an exciting time to be at Woods Oviatt Gilman. Through our continued growth, we work very hard to maintain an environment that is fun and a place to feel proud of while out in the community. The firm recognizes the importance of work/life balance and many programs are in place to support that philosophy.

Summary:

We are looking for a self-motivated Legal Assistant to join our growing team. This position is responsible for supporting attorneys and paralegals by performing a variety of administrative duties, including drafting correspondence, answering phones, communicating with attorneys, clients, and court personnel. The ideal candidate for this position has a strong work ethic, exceptional problem solving skills and is comfortable working in a fast-paced and dynamic workplace.

Duties and Responsibilities:

- Prepare estate planning documents: Wills, Power of Attorney, Living Wills and Health Care Proxies, and various types of Trust Agreements
- Prepare gift and note plans (Medicaid), estate planning asset summaries and flowcharts
- Perform the opening and closing of files as requested
- Proactively anticipate attorney needs by reviewing calendars and ensuring attorneys are prepared with all necessary documents for client meetings
- Manage E-Filing and complete this process for Attorney's and Paralegals as requested
- Provide professional, efficient and friendly client service on the telephone and in person
- Coordinate with clients, external counsel and other vendors to obtain and exchange information and documentation related to legal matters
- Assess the urgency of situations and determine appropriate actions, monitor status of pending item, provide follow up and keep management informed by communicating a wide variety of information
- Manage schedules, including trial dates and hearings
- Coordinate appointments, meetings, teleconference, video conference and business travel
- Utilize case management system for electronic data management of legal files
- Ensure that all necessary information is shared between clients and attorneys on various files
- Oversee and coordinate acquisition and maintenance of legal research and reference materials for office, including hard copy and electronic materials
- Enter timesheets for attorneys and paralegals
- Provide admin support such as transcribing dictation, maintaining calendars, setting up meetings, coordinate courier deliveries, sorting and distributing mail

POSITION DESCRIPTION

Legal Assistant

- Assist with overflow projects/assignments such as filing, photocopying, scanning, or reception relief and perform other duties as needed upon request by immediate supervisor

Minimum Required Qualifications:

- 1-3 years' experience in an administrative support role (preferably in legal)
- Type a minimum of 60 wpm
- Working knowledge of Adobe and Microsoft Office Suite: Outlook, Word, Excel, and PowerPoint
- Strong typing, computer, organizational, and administrative skills with meticulous attention to detail
- Excellent communication and interpersonal skills
- Ability to prioritize workload and independently manage multiple tasks
- Must be a team player and use firm resources effectively and efficiently
- Must maintain professional contact with attorneys and staff and observe confidentiality of client and firm matters

Other Duties: Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

To apply, visit our website at www.hr.woodsoviattgilman.com/careers/staff-opportunities. For additional information, please contact, Christiana Ortiz-Schmanke, Recruiter at cortiz@woodsoviatt.com

Woods Oviatt Gilman LLP is committed to the policy of equal employment opportunity. This policy expressly prohibits discrimination on the basis of sex, race, color, religion, creed, national origin, age, marital status, family status, sexual orientation, disability, genetic predisposition or carrier status, domestic violence victim status, veteran status or status as a member of any other protected group or activity.

Woods Oviatt Gilman LLP will reasonably accommodate individuals with disabilities throughout the employment selection process. If you believe you need an accommodation during the selection process, please contact the Human Resources Department at 585.987.2800 to make a request.