

## POSITION DESCRIPTION

Estates Clerk

### **Department**

Default Services

### **Classification**

Nonexempt

### **Reports to**

Partner(s), Associate(s), Paralegal(s), Team Leader(s)

### **Summary**

Legal support in some to all aspects of default services

### **Duties and Responsibilities**

1. Drafting and implementation of estate plans and related documents
2. Run searches per client instructions
3. Assist with sending documents for filing/recording and notating client systems
4. All other duties as assigned

### Expectations:

- Work closely with attorneys for maintaining structured and comprehensive case files
- Ability to prioritize and organize work effectively to meet strict deadlines
- Read and interpret court, client attorney, trustee and debtor emails
- Work closely with other employees in a team-familiarized manner
- Offer help to teammates if your caseload is light
- Maintain superior relations with clients
- Maintain a professional attitude and be respectful of others around you

### **Minimum Qualifications**

**Education:** Associates Degree and/or High School Diploma with commensurate administrative work experience.

**Required Knowledge and Experience:** This position requires at least one year of trust and estates experience in a law firm setting. Applicants must be proficient in Microsoft Office Programs, including Windows, Word, Excel, Outlook, as well as Adobe or PDFDocs. Document Management software experience is also preferred.

**Core Competencies:** Dependability, attention to detail, good spelling, ability to meet deadlines in a fast paced environment, excellent verbal and written communication skills, ability to produce a professional work-product with minimal errors, ability to work independently, with little or no direction, to multi-task, prioritize and problem-solve, strong positive interpersonal skills, ability to work in a team environment, and good time management skills.

**Physical Requirements:** Although a mainly sedentary position, applicants must have the ability to carry files, bend and stand for extended periods of time.