

Estate Planning and Probate Paralegal

Singerman, Mills, Desberg & Kauntz Co., L.P.A. (www.smdklaw.com) is a dynamic transactional boutique law firm in Beachwood, Ohio, focusing on real estate, business law, litigation, secured lending, tax, governmental relations, and estate planning and administration. We are seeking an experienced candidate to join our firm as an Estate Planning and Probate Paralegal.

Overview:

We are seeking a detail-oriented and dedicated Estate Planning and Probate Paralegal to join our legal team. As an Estate Planning and Probate Paralegal, you will play a vital role in assisting attorneys in the preparation and management of estate planning documents, probate proceedings, and trust administration matters. Your expertise and professionalism will contribute to providing exceptional legal services to our clients during crucial and sensitive times.

Responsibilities:

Document Preparation: Assist attorneys in drafting and reviewing estate planning documents, including wills, trusts, powers of attorney, advance healthcare directives, and beneficiary designations, ensuring accuracy and adherence to legal requirements.

Client Communication: Communicate with clients to gather necessary information for estate planning purposes and provide updates on the progress of probate matters. Offer compassionate and professional support during emotional and challenging times.

Probate and Trust Administration: Assist in probate and trust administration processes, including preparing and filing necessary court documents, maintaining case calendars, compiling transaction accountings, assisting with tax documents and deadlines, and facilitating asset transfers to beneficiaries.

Legal Research: Conduct legal research to support estate planning and probate matters, staying up-to-date with relevant laws and regulations.

Client Record Management: Maintain organized and confidential client files, ensuring all documents and communications are accurately recorded and maintained.

Assist in Meetings: Prepare meeting materials, schedule appointments, and attend client meetings.

Collaboration with Attorneys and Team: Work collaboratively with attorneys, fellow paralegals, and administrative staff to ensure seamless workflow and the highest level of client service.

Compliance and Deadlines: Monitor and track deadlines for estate planning documents, probate filings, and trust administration tasks to ensure timely execution.

Requirements:

- Bachelor's degree or paralegal certification from an accredited institution.
- Previous experience as an Estate Planning and Probate Paralegal.
- Advanced technological skills including proficiency in estate planning software and Microsoft Office Suite.
- Strong organizational and time-management skills, with the ability to manage multiple tasks simultaneously.
- Excellent written and verbal communication skills, with keen attention to detail.
- Sensitivity and empathy when interacting with clients during sensitive estate planning and probate matters.
- Familiarity with relevant estate planning and probate laws and regulations.
- Knowledge of legal research techniques and resources.
- Ability to work independently and as part of a collaborative legal team.
- Previous experience with corporate law and real estate matters a plus.

Benefits:

Singerman, Mills, Desberg & Kauntz Co., L.P.A., offers highly competitive compensation, 401(k) with employer match and profit sharing plan, standard (PPO) and health savings account (HSA) health insurance plans with generous employer contributions, optional flexible spending accounts, paid group term life insurance, paid short and long term disability insurance, paid holidays and vacation, optional dependent care assistance plan, and optional accident and critical care insurance.