

Position: Paralegal: Estate/Probate Practice Group

Status: Full-Time/Non-Exempt

Effective: 1/22/2026

Job Summary

The Paralegal supports the Estate Planning and Probate Practice Group by providing substantive legal and administrative assistance to attorneys. This position is responsible for preparing estate planning and probate documents, managing estate and trust administrations, coordinating client communications, maintaining case files and calendars, and assisting with court filings, tax matters, and asset transfers. Paralegal plays a key role in ensuring efficient case progression and high-quality client service within the practice group.

Essential Functions

- Prepare estate planning documents including, but not limited to, Powers of Attorney, Health Care Representative Declarations, Living Wills, Last Will and Testaments, and Revocable Living Trust Declarations.
- Manage probate and trust administrations, including preparation of petitions, pleadings, court filings, and other legal documents.
- Coordinate financial institution account transfers and real estate ownership transfers.
- Assist with preparation of state inheritance tax returns and state and federal fiduciary estate tax returns; prepare federal estate tax returns as needed.
- Obtain federal tax identification numbers for estates and trusts.
- Identify and assist in valuing estate assets, including real estate, personal property, agricultural property, insurance proceeds, investment and retirement accounts, and government benefits.
- Communicate directly with clients and manage related correspondence.
- Maintain organized physical and electronic case files, calendars, task lists, and deadlines.
- Provide administrative support to attorneys, including scheduling meetings and conference calls and coordinating logistics as needed.
- Enter time and billing information as requested and coordinate with the Billing Specialist on corrections or clarifications.
- Perform additional duties as assigned to support the efficient operation of the firm.

Skills & Qualifications

- Ability to manage confidential and sensitive information with discretion.
- Strong organizational skills with excellent attention to detail.
- Ability to prioritize and manage multiple matters in a deadline-driven environment.
- Ability to work independently while collaborating effectively with attorneys and staff.
- Excellent written and verbal communication skills across multiple platforms.
- Ability to organize and manage complex case files and records.
- Willingness and ability to learn firm-specific databases and software, including Perfect Law and Odyssey.
- Proficiency with Microsoft Office Suite.
- Paralegal certification or completion of an accredited paralegal program preferred.

Experience

- Familiarity with estate planning, probate procedures, and legal terminology required.
- Prior experience in a law firm preferred.