

Squillace & Associates, P.C.

Full-Time Paralegal – Trusts & Estates / Estate Planning

\$40,000 - \$50,000 / year, based on experience

Fantastic opportunity for a Trusts & Estates / Estate Planning paralegal looking to grow with a premier, expanding boutique law firm in Boston's Back Bay neighborhood. Squillace & Associates, P.C. is focused on life, estate, and business planning, and seeks to expand our team to better serve our clients and continue to grow our practice.

29 Commonwealth Avenue

Suite 700

Boston, MA 02116

For more information about the firm, visit: www.squillace-law.com.

POSITION RESPONSIBILITIES:

The ideal candidate is thoughtful and diligent, highly motivated, and oriented toward serving clients well. This position provides an opportunity to work collaboratively, both internally with colleagues and externally with client advisors and other parties, to participate meaningfully in the management of client files and the oversight of client relationships.

Specific responsibilities include the following:

- Conduct estate administrations, including probates and trust settlements (and preparation of requisite inventories and accountings), under the supervision of attorneys;
- Communicate with clients, courts, personal representatives and trustees, and other parties to provide and obtain information and documentation on matters;
- Assist with the preparation of Massachusetts and Federal estate and gift tax returns (Form 706 and Form 709);
- Preparation and review of certain trust funding documents including deeds, beneficiary designation forms, change of ownership forms, company-specific account forms, etc.;
- Assist with the preparation of highly customized foundational estate planning documents (i.e. revocable trusts, wills, powers of attorney, health care proxies, etc.);
- Perform traditional paralegal duties including producing various documents, correspondence, and memos as necessary;
- Perform certain traditional administrative duties including assembling estate planning documents for presentation to the client, managing schedules, coordinating meetings, providing phone support, and file maintenance (scanning and shredding of documents);
- Assist with Firm marketing endeavors by creating/editing presentations for professional groups, crafting certain marketing materials, monitoring certain social media presence, and tracking outcomes of marketing initiatives.

JOB REQUIREMENTS:

- At least 1-3 years of experience as either an estate administration or estate planning paralegal is required, including at least a basic knowledge of probating estates and settling trusts. A strong interest in the subject matter and the desire to learn is mandatory.
- The ability to maintain confidentiality, be discrete about sensitive client information, and possess the highest integrity is fundamental to this position.
- Applicants should be proactive self-starters (highly motivated problem solvers) who possesses the ability to work effectively under pressure with moderate supervision. Applicants must also have superior communication skills (both oral and written), excellent organizational skills, and a high level of dedication, discipline, and professionalism. An eye for detail and the ability to multi-task and meet deadlines are paramount. Applicants will be expected to assume responsibility for projects/tasks that are assigned and follow through to completion.
- General computer and technological literacy, with fluency in Microsoft Office products (Word, Excel, PowerPoint, and Outlook), Adobe Acrobat, and the Windows platform is required. The Firm also currently uses a client/contact management and calendaring software, a HotDocs based estate planning software, a tax preparation software, trust funding software, and estate and trust inventory and accounting software. Ability to quickly develop functional knowledge of new software platforms is imperative.

APPLICATION REQUIREMENTS:

- Candidates who submit resumes without a cover letter will not be considered for the position. No phone calls, please. Submissions should be directed to info@squillace-law.com. All resumes accepted in strict confidence.
- Principals only. Recruiters, please don't contact this job poster.
- Please do NOT contact us with unsolicited services or offers.

CORE COMPETENCIES:

A qualified candidate should possess the following underlying skills, abilities and behaviors necessary to be successful at our firm:

CUSTOMER SERVICE

- Commitment to the client experience
- Empathetic/Compassionate
- Ability to establish rapport and credibility with clients
- Polished demeanor for interfacing with clients

COMMITMENT

- Responsive
- Initiative
- Ownership
- Work ethic
- Execute and follow through to completion

PROFESSIONALISM

- Ability to work independently as well as effectively as part of a team
- Professional demeanor for interfacing with clients
- Resiliency
- Vested interest in success of the Firm
- Strong organizational skills and attention to detail

COMMUNICATION

- Open, direct, clear, and above all respectful communicator
- Excellent oral and written communication skills
- Listens effectively

PROBLEM SOLVING

- Open to coaching
- Ability to define the problem
- Multitasking and ability to prioritize and reprioritize tasks
- Asks smart and clarifying questions
- Figures out how to get things done