

JOB DESCRIPTION



Position Title:	Estate and Tax Paralegal	Department:	Tax
Reports to:	Assigning Attorney for Work Product and Director of Human Resources for Administrative Matters	FLSA:	Non-Exempt

Overall Objective of the Position:

The Estate and Tax Paralegal performs a variety of duties to assist attorneys according to established policies and procedures. Maintains positive contact with clients and observes confidentiality of client matters, organizes and maintains paper and electronic case files regarding estate planning, estate administration and other documents.

Qualifications:	<ul style="list-style-type: none"> • Team player with subordinates, peers and supervisors • Ability to coordinate and work together with other employees • Able to handle stress and high pressure situations • Able to prioritize tasks and perform under tight deadlines • Excellent verbal and written communication and listening skills; prepares, edits and proofreads all written communications for context, grammar, typographic, punctuation and spelling errors without being instructed to do so. • Customer service attitude towards all staff including attorneys, paralegals and assistants when asked to help out with a matter or perform a specific task for any department • Extreme attention to detail is required • Awareness and understanding of all firm policies and procedures • Ability to strategize, plan and think outside the box • Ownership, accuracy and thoroughness of work product; work must be complete and organized • Understand goals and needs of attorneys; handle multiple responsibilities effectively • Follow directions; ask questions and understand work procedures. • Knowledge of a broad variety of information technology software systems and programs used in the firm
------------------------	---

<p>Job Functions at the request of attorneys, staff and/or managers:</p>	<ul style="list-style-type: none"> • Prepares and files state and federal death tax returns for estates. • Prepares and files state and federal fiduciary income tax returns for trusts and estates. • Prepares and files state and federal gift tax returns for trusts and estates. • Prepares accountings as required in trusts, administrations of estates and trust summaries. • Compiles and inputs all data from checking accounts, financial statements, and brokerage statements. • Serves as liaison between client and attorney during the administration of an estate or trust. • Consults with firm attorneys in tax planning strategies for estates and trusts. • Prepares database information for estate planning and assembles correct forms using HotDocs • Engages in written correspondence with clients and others involved in the preparation of tax plans. • Gathers information regarding assets held by a client and debts by consulting with the client, the Executor, banks, brokerage firms, accountants, and other attorneys etc. • Files documents with the Clerk of Court in county in which trust or estate is administered. • Values securities publicly traded for the purpose of determining current value, date of death and alternate date of death values. • Arranges for the execution of documents and the signing of tax returns. • Determines and docket due dates of tax returns and accountings. • Operate computer software programs to complete tax returns and reports including the CAPS, VISIO and ZANE programs. • Performs all other incidental duties as assigned.
---	---

KNOWLEDGE, SKILLS AND ABILITIES REQUIRED:

1. A minimum of two years of paralegal experience working in a legal department or law firm/professional services environment
2. A paralegal should possess a combination of the following:
 - A certificate of completion of a paralegal program approved by the American Bar Association;
 - A degree from a postsecondary institution with a minimum of 24 units in law-related courses accredited by a national or regional accrediting organization as required by State law;
 - Completion of a four year college degree plus a minimum of one year of law-related experience under the supervision of a licensed attorney
3. Overall knowledge of rules and procedures; understanding of tax preparation software; familiarity with court structure
4. Advanced proficiency in Microsoft Word, Excel, Outlook and Adobe and specialized document management and preparation software
5. A highly professional demeanor and demonstrated work ethic including the willingness to take on extra tasks and responsibilities (including overtime) in order to meet client/firm needs
6. Comfort in both leadership and subordinate roles and flexibility in both structured and ambiguous situations

7. Resourcefulness and appropriate decision making. Examples include: Working cost effectively; using the appropriate resources, including online tools and websites; knowing when to inform a supervisor of a situation; and understanding the boundaries of the practice of law
8. The ability to express and articulate him/herself clearly, including use of proper grammar and appropriate vocabulary, as well as the ability to describe a set of facts or information in an organized, precise, clear and unambiguous fashion.
9. Work occasionally requires a high level of mental effort and strain while organizing and maintaining multiple cases.
10. Work occasionally requires more than 37.5 hours per week to perform the essential duties of the position; may require irregular hours.
11. Ability to travel to private and public buildings, locally and statewide, via private or public conveyance to assist attorneys in attending to client needs on legal matters.

PHYSICAL EFFORT AND PHYSICAL WORK ENVIRONMENT:

Section 1

Sedentary Work: Lifting 10 lbs. maximum and occasionally lifting and/or carrying items such as computer equipment, books, files, boxes ,etc. Walking and standing are required moderately.

Section 2 (Expressed in percentage of time engaged in activity)

<p>Factor #1 - Frequency <u>10%</u></p> <ul style="list-style-type: none"> • Lifting • Carrying 	<p>Pushing</p> <p>Pulling</p>	<p>Factor #4 - Frequency <u>100%</u></p> <ul style="list-style-type: none"> • Reaching • Handling 	<p>Feeling</p> <p>Keyboarding</p>
<p>Factor #2 - Frequency <u>5%</u></p> <ul style="list-style-type: none"> • Climbing • Balancing 		<p>Factor #5 - Frequency <u>100%</u></p> <ul style="list-style-type: none"> • Talking (Expressing or exchanging ideas by means of the spoken word.) • Hearing (Perceiving the nature of sounds by the ear.) 	
<p>Factor #3 - Frequency <u>10%</u></p> <ul style="list-style-type: none"> • Stooping • Kneeling 	<p>Crouching</p> <p>Crawling</p>	<p>Factor #6 - Frequency <u>100%</u></p> <p>Seeing (Visual acuity, depth, perception, field of vision, color vision)</p>	

Section 3

Factor #1 - Frequency	95%
Work is performed inside	
Factor #2 - Frequency	0%
Extremes of heat, cold or temperature changes	
Factor #3 - Frequency	0%
Humidity or wetness	
Factor #4 - Frequency	0%
Noise and Vibration	
Factor #5 - Frequency	5%
Mechanical hazards such as from using sharp tools, hand trucks, etc.	
Factor #6 - Frequency	0%
Electrical hazards	
Factor #7 - Frequency	0%
Fire or chemical hazards	
Factor #8 - Frequency	0%
Fumes, odors, toxic conditions, dust, poor ventilation (may be more prevalent depending on office location)	