KAUFMAN & CANOLES
attorneys at law

The Kaufman & Canoles Private Client Services Group practice is seeking a qualified **Trust & Estate Paralegal** to assist in the Trust and Estate practice area of our Norfolk office.

Our Private Client Services team is the second largest in the state and consists of an integrated group of over 30 lawyers, specialists, paralegals and other support personnel. Unlike many firms, we perform the full range of trusts and estates planning and administration, from the initial meetings with clients to the ultimate administration of their desires, and all tax filings required throughout that process. We are committed to provide thoughtful and cost effective services to the full range of our clients, from those with modest wealth to those with significant estates. Due to our firm's longevity, we have client relationships going into the 4th and 5th generations. We have a reputation of providing the highest level of service amongst our peers and all of the team enjoys deep and rewarding working relationships with both our clients and within our group. We value a pleasant work environment with positive people working at a high level of competency and responsibility.

RESPONSIBILITIES:

1. Manage bank and brokerage accounts for numerous individual Trusts and Estates, including making account disbursements and deposits, maintaining balances, transferring funds, and reconciling accounts.

2. Provide support to the Attorneys and Paralegals to include preparation of correspondence and other documents, maintain files and sub-files, and perform a variety of other administrative tasks as assigned.

3. Interact with various banks and brokerage firms via telephone and email.

4. Prepare and maintain Excel spreadsheets; file quarterly estimated tax payments; compile tax packages; and prepare correspondence to file returns with taxing authorities.

5. Schedule and prepare required documentation for probated estates

6. Schedule Show Cause Hearings and prepare required documentation, schedule attorney attendance, and follow up with Circuit Court, as needed.

7. Obtain tax identification numbers online through the Internal Revenue Service.

8. Organize monthly account activity to forward to accounting outsourcing company.

9. Determine automobile valuations and conduct unclaimed property searches.

10. Maintain detailed and accurate daily billable hour records.

QUALIFICATIONS:

1. Bachelor's Degree preferred.

2. One or more years' work experience in a professional office environment is beneficial.

3. Proficiency in Microsoft Office 2016 with working knowledge of Excel.

4. Demonstrated exceptional mathematical aptitude.

5. Ability to work both independently and within a team environment.

6. Proven organizational skills and meticulous attention to detail.

7. Ability to multi-task, prioritize competing responsibilities, and meet deadlines.

8. Ability to establish and maintain effective working relationships with clients, attorneys, co-workers, and other outside professionals.

9. Excellent oral and written communication skills.

10. Must be a self-starter and have a strong work ethic.

BENEFITS:

We offer competitive salary and a comprehensive benefit package. Benefits include: medical, dental, life insurance, 401(k)/profit sharing, paid time off, paid garage parking, long term and short term disability.