LEGAL SECRETARY TRUST AND ESTATE PRACTICE, Reno, NV (with paid relocation assistance). Reno-Tahoe isn't just a vacation destination! Northern Nevada is situated in the Sierra Nevada Mountains, just a 40-minute drive from beautiful, breathtaking Lake Tahoe. The area offers year-round outdoor activities, endless entertainment and dining options. Just a short jaunt from the Silicon Valley and the Bay Area, and their economy is booming! No State income tax and affordable housing makes our area very desirable for new businesses and families to call Northern Nevada home.

Our client is one of the largest law firms in Nevada, currently has an excellent full-time legal secretary opportunity. This is an opportunity to work for Nevada's only Chamber's Band 1 rated High Net Worth Wealth Group, located in our Reno, Nevada office. They offer relocation assistance, competitive compensation and an excellent benefits package for the ideal candidate. Having been awarded Best Place to Work 5 years in a row, shows our commitment to maintaining a positive culture and work-life balance.

The ideal candidate will have at least five years of experience in trust and estate planning for high net worth clients. Proficiency with Windows-based software and Microsoft Word, Excel, PowerPoint and Outlook are required.

A BACHELOR'S DEGREE AND/OR PARALEGAL CERTIFICATION IS A PLUS.

The Trust & Estate Secretary will assist a senior partner in the preparation and revision of trusts, wills and other related estate planning documents. In addition, the Secretary will be responsible for administrative duties, including, but not limited to, answering phones, maintaining client files, managing attorneys' calendars, travel itineraries and processing expense reports.

DUTIES AND RESPONSIBILITIES:

· Assist in the formation and operation of family trust companies.

· Revise and redline correspondence, trusts, wills, partnership agreements, pleadings, corporate agreements, tax petitions and correspondence.

· Assist in drafting legal documents, including wills, trusts, powers of attorney and advance health care directives.

· Assist in the preparation of contracts, business agreements, operating agreements and partnership agreements.

· Facilitate the transfer of assets and stock certificates to beneficiaries of trusts and estates.

· Obtain Federal Tax ID EIN number for trusts and estates.

· Assist in the formation of legal entities and related documentation.

· Gather information and prepare materials for filing 706 estate tax returns, income tax returns and fiduciary income tax returns for decedents.

· Calendar quarterly income tax payments for trusts and estates.

· File forms related to non-profit organizations.

· File petitions for probate, trust-related documents, pleadings and declarations with applicable courts.

· Prepare engagement letters and new matter reports for new clients.

· Anticipate client and attorney’s needs, organize and set up meetings and appointments in a timely fashion, update files and provided daily calendar reminders of all scheduled meetings, court hearings and appointments. Coordinate with attorneys as to time, location and participants associated with meetings, and make travel arrangements.

· Obtain files for review by attorney prior to meeting with clients. Prepare and update binders with executed estate planning documents. Scan all executed estate planning documents to the electronic file system and send original documents to the vault.

· Manage incoming and outgoing calls for partner.

SKILLS & COMPETENCIES:

The position requires exemplary organizational skills, attention to detail, top-notch client service skills, strong verbal and written communication skills, and the ability to work well under pressure, multi-task and set priorities while meeting deadlines in a fast-paced environment. The successful candidate will be a team player with a positive attitude, and the ability to effectively interface with clients, client representatives, outside counsel and advisors.