Legal Secretary/EA in Reno, NV (onsite, full-time)

Our client is seeking a Legal Secretary to join their Trust & Estates Practice team. Their firm has two office locations, in Reno and Las Vegas, supporting Nevada's business law needs since 1949. 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 competitive compensation and an excellent benefits package for the ideal candidate.

LEGAL SECRETARY TRUST AND ESTATE PRACTICE POSITION SUMMARY:

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 a high volume of mail and other correspondence, 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 provide 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 attorneys.

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.

QUALIFICATIONS & PRIOR EXPERIENCE:

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.

Job Type: Full-time
Benefits:

- 401(k)
- Dental insurance
- Employee assistance program
- Flexible spending account
- Health insurance
- Health savings account
- Life insurance
- Paid time off
- Parental leave
- Profit sharing
- Referral program
- Tuition reimbursement
- Vision insurance

Schedule:

- 8 hour shift
- Monday to Friday

Travel requirement:

- No travel

Work Location: In person, onsite

$65,000 to $80,000 depending on experience, education, paralegal certification, etc.