



Legal Administrative Assistant

Position Type: Full Time

Department: Wealth Planning

POSITION SUMMARY

Assisting attorneys with wealth planning matters such as handling attorney phone calls & messages; time entry and billing; scheduling meetings; making travel arrangements; communicating with clients; managing hard copy documents & profiling electronic documents/emails; and distribution of correspondence and legal documents.

KNOWLEDGE, SKILLS, & ABILITIES REQUIRED

- Must be highly organized and able to manage multiple concurrent projects
- Comfortable communicating with clients
- Excellent knowledge of Microsoft Office, especially Word and Outlook.
- Working knowledge of legal documents, formatting, table of contents, styles, track changes
- Experience working with a document management system (iManage experience a plus).
- Good grammatical and writing skills.
- Ability to multi-task and work closely with attorneys in a fast paced busy role.
- Minimum of 3 years' experience, 5 years preferred in wealth planning
- Law firm experience

The above is intended to describe the general content of and requirements for the performance of this job. It is not to be construed as an exhaustive statement of essential functions, responsibilities or requirements.

