

# Trust and Estates Paralegal (Dallas office)

**Department:** Paralegal

**Reports To:** Paralegal Coordinator

**FLSA:** Non-Exempt

## ESSENTIAL DUTIES AND RESPONSIBILITIES

- Prepare correspondence, estate planning documents, and corporate/partnership/LLC documents
- Maintain tracking system for clients and entities, including saving documents to document management system
- Assist with execution of estate planning documents
- Prepare initial drafts of various state and federal tax reports and returns, including Texas Franchise Tax No Tax Due Reports, Texas Franchise Tax Public Information Reports, U.S. Gift (and Generation-Skipping Transfer) Tax Returns – Form 709s, U.S. Estate (and Generation-Skipping Transfer) Tax Returns – Form 706s
- Draft probate pleadings, prepare materials for and correspondence with clients and witnesses relating to court hearings, and handle most aspects of administration of the estate, include probate tracker for internal use for tracking deadlines on probate matters
- Interact with courts and various government agencies to set hearings and obtain information, for estate and trust administration matters
- Perform legal research tasks using all available resources including libraries and computer research systems
- Organize and maintain trust, estate, corporate, partnership and LLC record books, forms and indices
- Assist with review of real estate contracts, title commitments, surveys, closing documents, and other related documents as requested
- Travel to private and public buildings to assist attorney in attending to client legal matters
- Work occasional overtime to perform the essential duties of the position
- Track and record time spent performing all firm-related tasks
- Take initiative in acquiring and managing projects from attorneys
- Maintain positive contact with clients

## KNOWLEDGE, SKILLS AND ABILITIES REQUIRED

- Interpersonal skills necessary to communicate and follow instructions effectively from a diverse group of clients, attorneys and staff to provide information with courtesy and tact.
- Interpersonal skills necessary to communicate in person, by e-mail and telephone to provide information with courtesy and tact.
- Ability to organize and prioritize numerous tasks and complete them under time constraints.
- Ability to read and write in order to proof and perform editing (e.g., punctuation, grammar, spelling) of routine law office correspondence and legal case matters. Perform non-complex arithmetic calculations



when verifying calculations on forms and documents; maintain records and filing systems at a level normally acquired through completion of a 4-year undergraduate degree.

- 5 years or more work experience in practice area preferred
- Substantive knowledge and proficient use of Microsoft Word, Excel and PowerPoint
- Work may occasionally require more than 40 hours per week to perform the essential duties of the position; may require irregular hours.

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.

