JOB DESCRIPTION

JOB TITLE: Case Clerk

FLSA STATUS: Full Time, Non-Exempt

DEPARTMENT: Family Wealth Planning

REPORTS TO: Family Wealth Planning Lawyer and Paralegals

SUMMARY: Performs a variety of duties under the direct supervision of Family Wealth Planning members in all aspects of estate planning, tax, probate and trust administration work, focusing on the organization and maintenance of hard copy and electronic documents and files.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Assist Family Wealth Planning members with the organization and maintenance of documents for estate planning, tax, probate and trust administration work.
- Maintain case files.
- Create and index client binders and internal files.
- Locate specific documents and prepare documents and files for storage and return to clients.
- Input/retrieve data on the system.
- Photocopy, scan and fax documents.
- Ensure all necessary documents are timely and properly completed, executed, received, delivered and distributed.
- Update Personal and Family Information ("PFI") sheets.
- Prepare and submit check requests.
- Create e-binders for clients and for internal files.
- Fill out Judicial Council forms under the direction of the paralegals.
- Create FedEx labels and handle mailing projects.
- Maintain original safe log and return old original documents to clients as appropriate.
- Sort and file transferred physical client files (creating indexes, etc.).
- Sort and rename electronic files for imported, transferred client files.
- Responsible for managing the organization of the FWP file room, send client files to storage, and maintain list of files in filing room.
- Other duties as assigned.

ESSENTIAL COMPETENCIES AND SKILLS:

- Ability to work flexibly and proactively, and follow detailed directions from FWP members.
- Detail oriented, professional attitude, reliable, and well organized.
- Ability to work independently and with a team.
- Desire to learn and cross-train in various clerical functions.
- Good communication and interpersonal skills.
- Ability to meet deadlines and follow through on assigned tasks, and provide status reports.
- Strong problem solving and multi-tasking skills.
- Strong time management skills and the ability to work under pressure in a fast-paced environment.
- Good attendance and willingness to work overtime as required.

- General or working knowledge of Windows, Adobe Acrobat and document management system (e.g., iManage), helpful, but not required.
- Capable of manipulating databases or learning new databases.

REQUIRED EDUCATION AND EXPERIENCE:

- High School diploma or equivalent required.
- College degree preferred, but not required.
- Notary Public or willingness to become a Notary Public (paid by firm).
- Prior law office experience preferred.

SUPERVISORY RESPONSIBILITY: None

SALARY RANGE: The anticipated hourly salary wage range the Firm reasonably expects to pay candidates for the position of $32.97 to $38.46 ($60,000 to 70,000 annually). The final annual salary wage offered to a successful candidate will be dependent on several factors that may include but are not limited to the type and years of experience in the job, type and years of experience in the industry, education, and other factors.

WORKING CONDITIONS: Normal office environment with little exposure to excessive noise, dust, temperature and the like.

POSITION TYPE/EXPECTED HOURS OF WORK: This is a full-time position that requires employee to work 100% in the office. Days and hours of work generally are Monday through Friday, 9:00 a.m. to 5:00 p.m. Evening and weekend work may be required as job duties demand. This is a non-exempt position under the Fair Labor Standards Act.

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

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