

The Stevens & Lee Companies

Job Description: Trusts & Estates Paralegal

Powerful Partnerships. Standout Solutions.

Stevens & Lee is a full-service law firm with approximately 190 attorneys in 18 offices in Pennsylvania, New Jersey, NYC, Boston, and Wilmington DE. We provide services to a wide range of business clients from lower middle-market to Fortune 500 companies – on a regional and national basis. The law firm is part of *The Stevens & Lee Companies*, a diversified professional services firm with synergistic lines of business, including an investment bank and other complementary financial and consulting services organizations.

Job Overview

We are seeking a highly motivated and detail-oriented Trusts and Estates Paralegal to join our team. The ideal candidate will have experience in, estate and trust administration, preparation of state and federal death tax returns and fiduciary income tax returns, and probate procedures. As a Trusts and Estates Paralegal, you will work closely with attorneys and clients to support all aspects of Estate and Trust administration.

At Stevens & Lee, the Trusts & Estates Paralegal plays a vital role as a team member supporting a group of attorneys with the shared goal of providing exceptional service to our valued clients. The Trusts & Estates Paralegal is a multi-dimensional position drawing upon a variety of skills and competencies, best suited for a highly organized, detail-oriented individual who has a deep understanding of the law.

This position is full-time, in office Monday to Friday. The location for this role can be any of our New Jersey or Pennsylvania offices, though we have a preference for Valley Forge, PA.

Primary Responsibilities

- Estate Planning Support: Assist with estate planning processes, including asset valuation, beneficiary designations, and tax planning strategies.
- Probate Administration: Facilitate the probate process by preparing and filing court documents, communicating with beneficiaries and heirs, maintaining accurate records, preparing estate accountings, and coordinating asset distribution.
- Trust Administration: Manage trust administration tasks, including funding trusts, tracking distributions, maintaining accurate records, and preparing trust accountings.
- Legal Research: Conduct legal research on trust and estate matters, staying current on relevant laws, regulations, and case law to support attorneys in case preparation and strategy.
- Meet with attorneys and other professionals to discuss assigned cases or projects.
- Serve as liaison between firm, clients, advisors, and beneficiaries.
- Prepare federal and state individual and fiduciary income tax returns, gift tax returns, and estate and inheritance tax returns.
- Develop and maintain records regarding billable hours spent on specific matters.
- Maintain and organize matter files, documents, and correspondence.
- Monitor and track estate and trust administration developments and ensure timely updates to attorneys and clients.
- Work as a team with other law firm support personnel to ensure all tasks and assignments have been completed.

Skills & Competencies

- Flexibility and ability to respond quickly and positively to shifting demands.
- Ability to work under pressure to meet strict deadlines.
- Excellent client service skills and ability to work on multiple matters simultaneously in an organized manner and under minimal supervision.
- Ability to communicate professionally and interact effectively with all levels of personnel.

Qualifications

- Bachelor's degree or equivalent relevant work experience; Paralegal certificate a plus.
- 5-8 years of experience in trusts & estates with a law firm, accounting firm, or bank trust departments.
- Previous experience in PA and NJ trust & estates administration.
- Previous experience in probate process and preparing state, and federal fiduciary income and death tax returns.
- Proficiency with Windows-based software and Microsoft Office Suite, including Word, PowerPoint, Excel, and Outlook.
- Proficiency with document management systems, preferably iManage.
- Outstanding proficiency in mathematics and deep comprehension of mathematical principles.
- Experience with Lackner is a plus.
- Experience Notary Public is a plus.

Interested candidates should submit a resume and cover letter to: jobs@stevenslee.com.

In compliance with federal and state equal opportunity employment laws, The Stevens & Lee Companies is an affirmative action/equal opportunity employer and does not discriminate in regard to race, color, national origin, religion, disability, age, or gender.