**Estate Planning Paralegal Job Description Template**

[Insert company name here] is an established and successful law firm specializing in [insert key areas of focus here]

We’re looking for an Estate Planning Paralegal who will be responsible for all aspects of a client’s estate plan as assigned by the attorney. He/she shall prepare personal financial statements and flow charts of the estate plan, work with clients to change asset titles and beneficiary designations as their estate plan dictate, provide estate work support to other members of the firm, and provide estate tax advice to clients.

### Roles & Responsibilities

Responsibilities include, but are not limited to:

* Prepare personal financial statements, flow charts, diagrams, and other support documents for estate planning based on individual tax returns, asset lists, and other documentation as provided by accountants and clients.
* Review draft estate planning documents for accuracy.
* Assist clients with beneficiary changes and titling of assets to best coordinate with estate plans.
* Communicate effectively with other paralegals, clients, third parties (e.g. accountants, insurance brokers), attorneys, and support staff.
* Monitor the progress of assignments and bring conflicts to the attention of the responsible attorney.
* Assure efficient and effective use of estate planning software. Identify training needs and make the necessary arrangements. Identify system problems and work with the System Administrator to find solutions.
* Utilize computers and appropriate software to perform tasks in an efficient manner and according to the company’s best practices.
* Participate in training programs to learn and incorporate new computer skills and operational methods to meet the prevailing company's best practices as required for the position.

### About you

* [insert number] years’ experience as an Estate Planning paralegal, preferably within a law firm setting
* Prior experience with trust administration is essential
* Experience with Estate related tax returns is very helpful
* Expert knowledge of Probate rules and procedures

### What you’ll get in return

The firm offers a generous benefits package along with compensation based on experience level and client orientation.

* Competitive compensation based on experience
* Medical insurance plan
* Dental insurance plan
* Vision insurance plan
* Contribution to life insurance plan
* 401k profit sharing
* Parking reimbursement
* Social, charity, and wellness events

To apply for the role or have a confidential discussion, contact us on [insert recruiter email address] or [insert recruiter phone number]