

**Job Description - Paralegal****Summary of Responsibilities**

Performs a variety of duties to assist attorneys to whom assigned according to established policies and procedures. Maintains positive and timely contact with clients and observes confidentiality of client matters. Organizes and maintains case files, pleadings and other documents and attorney notebooks. Monitors court dockets on current cases. May be required to summarize articles, reports, and client communications. Keeps accurate time records.

Under the direct supervision of the Firm's attorneys, a Paralegal performs substantive legal work and status updates that requires basic knowledge of the law and legal concepts. The Paralegal is required to recognize, evaluate, organize, analyze, and communicate relevant facts and legal concepts. The Paralegal's duties vary and depend largely on the specific area of practice in which the Paralegal is engaged.

This position reports to the Director of Firm Operations.

**Key Responsibilities**

- Follows the ethical requirements as set forth by the Rules of Professional Conduct of the state.
- Manages the timely progression of client matters and provides monthly updates as to status.
- Communicates directly with clients, but does not provide legal advice.
- Maintains communication and rapport with clerks and bailiffs of applicable courts.
- Assists the attorney in client interviews and investigation.
- Drafts client correspondence.
- Reviews and analyzes matters to prepare matter evaluations and status reports to clients.
- Drafts legal documents for attorney review, including, as applicable, court pleadings and filings, beneficiary claim forms, and submissions to state and federal agencies.
- Attends, as applicable, hearings and client meetings.
- May be required to utilize computerized litigation filing techniques and estate and inheritance tax preparation software when applicable.
- Prepares initial drafts of Federal Estate and Gift Tax Returns and Inheritance Tax Worksheets.

**Required Knowledge, Abilities and Skills**

Paralegal degree or commensurate on the job experience to gain expertise needed to do substantive legal support work.

- Five years of experience in a law firm specializing in probate and estate and trust administration preferred.
- Knowledge of legal principles and practices at a level normally acquired through formal paralegal training or its equivalent.
- Understanding of law firm client billing practices and procedures and ability to follow the same.
- Ability to organize and prioritize numerous tasks and complete them under time constraints.

- Articulates understanding of logging appropriate billable hours. Ability to accurately capture billable hours and enter into computerized time-keeper system at the end of each working day.
- Ability to concentrate and pay close attention to detail.
- Interpersonal skills necessary to communicate in person, by e-mail and telephone and follow the instruction effectively from a diverse group of clients, attorneys and staff and provide information with ordinary courtesy and tact.
- Work occasionally requires more than 40 hours per week to perform the essential duties of the position; may require irregular hours.
- Ability to operate standard office equipment and software.
- Ability to travel to private and public buildings, locally and statewide, via private or public conveyance to assist attorney in attending to client needs on legal matters.
- Proficient in Microsoft programs, such as Outlook, Word, Excel, PowerPoint, etc.

**Physical Work Conditions and Demands**

- This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.
- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.
- While performing the duties of this job, the employee is regularly required to see, talk and hear.
- This position requires the ability to occasionally lift office products and supplies, up to 20 pounds.

**Completion of Work**

The expectation of this position is that individuals accurately capture billable hours and record them accordingly, in accordance with the Firm's policy on billing.

**Professional Certifications and Credentials**

- Required to be Notary Public through the State of Nebraska.
- Paralegal Associates Degree or related certification strongly preferred.
- Bachelor's Degree in paralegal studies or related field strongly preferred.

**Signatures**

Approved:

Managing Partner: Daniel E. Klaus

Director of Firm Operations: Jason R. Griess

Employee signature below constitutes employee's understanding of the requirements essential functions and duties of the position.

Employee: \_\_\_\_\_ Date: \_\_\_\_\_

**Revised Date: May 18, 2020**