

## Seeking a Client Services Coordinator for Estate Planning

Do you want to help families protect themselves from avoidable costs and expenses?

We are an entrepreneurial Elder Law and Estate Planning firm that is on track for aggressive growth and we need an experienced Client Services Coordinator to join our team and work directly with the managers to support the team and help our clients.

We want to be known for helping our clients put well-crafted plans in place to help them and their families through difficult times of illness and long-term care periods and their passing. It is important to the families we help, and to us, that their plan helps ease the emotional and financial burdens of such times. We want families we help to know they were listened to and care for as we helped. We are growing fast, and we need an associate who can hit the ground running.

This position will be responsible for important work, including:

- Assists with the preparation and distribution of information to prospects, clients and referrals.
- Opens, closes, scans and files documents in accordance with established procedures.
- Responsible for Area of Special Focus: Estate Planning and Estate Administration
  - o Assists with gathering client information for cases,
  - o Prepares the various intakes as directed,
  - o Ensures all deadlines are documented and tracked.
  - o Is responsible for knowing the status of each open and pending case and providing status updates to the legal team.
  - o Responsible for preparing and mailing confirmation letters for all appointments and assisting with reminder phone calls.
  - o Oversees all client requests and is responsible for the management of the relationship with the client. If appropriate, CSC may route requests or issues to an appropriate person or role for resolution.
  - o Pulls and prepares all client files for the day's meetings to ensure all necessary materials are in the file and to track ongoing client status.
  - o Follows up with the Team member after each meeting.
  - o Assists with collecting and tracking client fees paid to the firm.
  - o Provides case status reports
- Maintains data per policies and procedures.
- Draft documents for estate planning clients based on attorney instructions and under Director of Client Services supervision.
- Regularly communicate any concerns with Director of Client Services, attorneys and other co-workers.
- Responsible for tracking time following the firm's procedures.
- Assists with seminars – planning, scheduling, follow-up and data entry per policies and procedures.
- Completes client screening by using judgment to discern whether the prospect has a crisis issue and how to best serve the prospect's needs. The CSC is responsible

for capturing contact information per procedure and then inputting this information into the firm database system.

- Supports marketing activities by assisting the team.
- Assists receptionist as needed with greeting clients and answering and routing calls.
- All other duties as assigned

If these statements appeal to you, then you may be our Client Services Coordinator for Estate Planning:

- You love working with older people
- Patience is your middle name, and Drama is not
- Attention to detail is part of your everyday routine
- You enjoy working as part of a team
- You understand how to mentor and teach others
- Growing the firm and your practice is important to you
- You do not think scanning, copying and emptying the trash are “beneath you”

**Education or Experience:**

High school diploma or GED required. Associate’s degree and/or 3-5 years’ related administrative work, client relationship skills with excellent proofreading skills and strong attention to details required. Excellent written and verbal communication skills essential. A background working in long term care, public services or grants management is a plus.

**Knowledge, Skills and Abilities:**

- Knowledge of modern office equipment (printer, copier, fax, scanner)
- Knowledge of and efficient computer skills: Microsoft Office- Word, Outlook, Excel, Power Point
- Professional demeanor with excellent client service skills
- Excellent verbal and written communication skills (grammar, punctuation, spelling and proofreading skills)
- Ability to develop rapport with potential clients
- Sound judgment and be able to proactively identify solutions to problems
- High degree of accuracy with strong attention to detail
- Organizational skills and ability to meet deadlines
- Ability to take initiative and follow tasks through to completion
- Ability to work in fast paced environment, juggling multiple tasks
- Ability to follow established procedures
- Team-oriented with ability to work independently
- Ability to take direction as well as learn from constructive feedback
- Flexibility with ability to adapt to change
- Strong work ethic, sense of accountability and ability to take ownership for work
- Ethical code of conduct and ability to maintain confidentiality
- Ability to relate to and work with the elderly, their families and caregivers
- Positive attitude and demeanor with ability to demonstrate tact, empathy and diplomacy

Prepare a cover letter with no more than TWO paragraphs and a closing sentence. In the first paragraph explain what you believe are the 3 most important qualities needed in someone who works with estate planning and elder law clients and why you believe they are the most important qualities. In the second paragraph, explain why you applied to this particular ad. As a closing sentence please write, "I have read the instructions contained in the job posting and have followed the instructions."

Do not send your resume through this website. Email your resume and cover letter in PDF format to [Amanda@Brumbaughelderlaw.com](mailto:Amanda@Brumbaughelderlaw.com). The subject line of the email should include your last name (all caps), followed by the position you are applying for in lower case, followed by one word that you would use to describe yourself in all caps. [For example: SMITH client services coordinator-estate planning AWESOME]

We look forward to reviewing your application.

**APPLICATIONS RECEIVED THROUGH THIS SYSTEM AND THAT DO NOT FOLLOW INSTRUCTIONS WILL NOT BE CONSIDERED.**