



## **Experienced Wills, Trusts, and Probate Paralegal (Remote ok)**

We are hiring a part-time (20-30 hours per week) remote paralegal experienced in wills, trusts, and probate law to directly support CEO and Founding Attorney Marisa Nelson and future additions to the team at the Law Office of Marisa Nelson, PC. We are a small and actively growing women-owned and operated law firm focused on the preparation and administration of wills, trusts, and probate.

Experience in a wills, trusts, and probate law office, drafting estate plans, trust administration, and probate documents, caring for clients, and drafting documents in WealthCounsel is required. This is not an entry level position, and you must be able to work independently a substantial portion of the time, as well as communicating and collaborating closely with Marisa intermittently.

Our relationships with our clients are central to our practice. A key part of your role will be taking excellent care of our clients via email and phone. Your ability to build rapport and trust is just as important as your keen attention to detail, and your ability, knowledge, and experience preparing legal documents, determining what information is needed, and obtaining and integrating that information to ensure everything is ready to go prior to Marisa's meetings with clients.

We are a modern practice. We've never had a fax machine or leatherbound books. Most of our client meetings are still on zoom because nobody needs to spend more time in traffic, and it allows us to serve clients all over California and the world. We do have a physical office and occasionally meet clients there, but it is not our default.

This position is remote, and you may work from anywhere, so long as you are consistently available during the business day (Pacific Time) and have a quiet, confidential space to work from with a fast, reliable internet connection. If you prefer to work from our office, please note that in your application.

To apply, email your resume and any other relevant materials, along with the following information, to [info@marisanelson.com](mailto:info@marisanelson.com) with the subject the line "Application for paralegal position" and a list of any of the following items you are especially experienced in, your favorite part of this job description, and which items you are least comfortable or experienced with. Incomplete applications will not be considered. Interviews will be scheduled on a rolling basis.



The position's responsibilities include:

- Drafting legal documents, including estate plans, trust administration documents, deeds, and probate Judicial Council forms, using WealthCounsel and our templates.
- Communicating with clients via phone and email to ensure clients feel cared for, cases keep moving forward, and clients are aware of next steps and what is needed, and have the information they need as well.
- Preparing and sending service agreements, invoices, and questionnaires to clients using a combination of email and Lawmatics (our document automation software and CRM).
- Answering and returning phone calls and responding to emails. Most client scheduling is completed on our website by the client/potential client, but you'll take care of those clients and prospects who do call the office.
- Formatting Word documents to ensure all correspondence and legal documents are clean, clear, and professional.
- E-filing probate documents with the probate court (usually San Mateo and Santa Clara counties) via OneLegal.
- Providing administrative support to attorneys/team members.
- Maintaining clear and effective communication re: deadlines, questions, and needs.
- Maintaining our email list, CRM (Lawmatics), and client contact info.
- Contributing to improving systems, including automations within Lawmatics and other software, digital files and templates, and written and video procedure documentation.

If you love details, getting things done and doing them well, and building genuine relationships with some of the best clients around, we look forward to receiving your application!

We love working with people of diverse backgrounds, lifestyles, experiences, abilities, and perspectives. Women, BIPOC, and LGBTQ+ are strongly encouraged to apply.