

TRUSTS AND ESTATES PARALEGAL – SACRAMENTO

Weintraub Tobin is an innovative provider of sophisticated legal services to dynamic businesses and business owners, individuals, emerging companies, and nonprofits. From locations in Sacramento, San Francisco, Los Angeles, and San Diego, more than 75 attorneys representing businesses and individuals throughout California with in corporate, tax, litigation, labor and employment, real estate, intellectual property, entertainment, and trusts and estates matters. We maintain our leadership position by creating a value-added, trust-based relationship with our clients, supporting our local communities, and developing deep subject-matter expertise. We offer a supportive and collegial environment where individual contributions are recognized and celebrated, and hard work is balanced with personal fulfillment and responsibilities.

Weintraub Tobin's Trusts and Estates (T&E) Group focuses on clients' personal concerns, as well as their estate planning, tax, and litigation goals. Our estate planners have extensive experience with designing and implementing sophisticated estate, valuation, and philanthropic planning techniques and work with clients to integrate their business succession planning and retirement planning. Our T&E group is also well-recognized for its probate, trust, and conservatorship administration services. They represent beneficiaries, executors, corporate, and individual trustees. In addition, our T&E litigators have extensive experience with Alternative Dispute Resolution including mediation and arbitration.

Our Sacramento Trusts and Estates Group is seeking an experienced Paralegal to join their growing practice group. The successful candidate must be able to take direction from multiple attorneys, effectively manage time and assignments, enjoy working as part of a team, and demonstrate a first-class commitment to client service.

REQUIREMENTS AND EXPECTATIONS

Under attorney supervision, the Trusts and Estates Paralegal will be expected to carry out the below job duties and responsibilities.

- Draft and prepare estate planning documents (e.g. wills, trusts, powers of attorney).
- Work closely with clients to gather information, customize their documents to their specific needs and coordinate the signing of documents.
- Manage trust and probate administration case matters and deadlines, from opening to closing the estate or trust, as well as, valuating estate assets and drafting court forms, petitions, and orders.
- Assist in preparation of estate tax returns.
- Prepare and record deeds with accompanying transfer documents.
- Prepare asset lists, analyze bank and business records, identify trust and non-trust assets, and identify title and character of assets.
- Determine beneficiaries and persons entitled to notice.

- Prepare court petitions, including those related to trust modification, petitions for instructions, Probate Code Section 850 petitions, petitions to approve accountings, estate distribution, and objections and replies to petitions.
- Familiarity with Probate Code notice requirements and ability to manage calendar notice deadlines.
- Oversee conservatorship matters and deadlines for filing.
- Accompany supervising attorney(s) in meeting with clients.
- Additional duties as assigned by supervising attorneys and/or Firm management.

EDUCATION AND EXPERIENCE

- Minimum of 4-6 years of experience with drafting estate planning documents
- 5+ years of experience in estate planning, trust administration, and estate and probate administration
- Paralegal certificate required
- Bachelor's degree preferred
- Current and working knowledge of foundational estate planning
- Superior drafting skills, attention to detail and organizational ability
- Familiarity with Worldox or similar document management system
- Communicates effectively with attorneys and legal staff at all levels
- Advanced operation and knowledge of Microsoft Office Suite (Outlook, Word, Excel and PowerPoint).
- Superior attention to detail and organizational ability

Qualified candidates should send their cover letter and resume to recruiting@weintraub.com

EQUAL EMPLOYMENT OPPORTUNITY

The Firm is an equal opportunity employer. It is Firm policy to provide equal opportunities to all qualified individuals regardless of race, color, creed, religion, national origin, sex, age, physical or mental disability, medical condition, marital status, sexual orientation, sexual identity, genetics, veteran status, or any other class protected under federal, state, or local law. This policy applies to all terms and conditions of employment. It is the intent of the Firm to comply with all applicable federal and state laws with respect to fair employment practices. The Firm will provide reasonable accommodation to qualified applicants and employees with a known disability or medical condition or for an employee's religious beliefs provided the accommodation does not cause undue hardship to the Firm. Any applicant or employee with a qualifying disability or medical condition, or a religious practice, that requires an accommodation in order for the employee to perform the essential function of his or her job, should contact Human Resources to discuss it further so the Firm can determine if a reasonable accommodation exists and can be provided.

Note: If an applicant accepts an offer from the Firm, all confirmed new hires must comply with the Firm's mandatory COVID-19 vaccination policy. Further information about the policy is available to qualified candidates upon request.