



Title: Estate Planning Paralegal

Location: Phoenix, AZ

Job Description: **JOB SUMMARY**

The paralegal's primary responsibility is to take on as much work from the attorney as possible, with a focus on accuracy and efficiency. The Estate Planning Paralegal provides administrative and substantive legal support to the attorneys of Creative Planning's legal department.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Creates estate planning documents and diagrams for attorneys
- Prepares mailings to clients of documents to be signed
- Reviews and processes incoming signed documents from clients
- Prepares and records deeds
- Prepares attorney and transmittal correspondence
- All other duties are assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Bachelor's Degree
- Efficient, detail-oriented and accurate

PREFERRED EXPERIENCE / QUALIFICATIONS

- 3+ years of paralegal experience

TECHNICAL SKILLS

- Proficient in Microsoft Office