



Title: Estate & Trust Paralegal

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

The Estate & Trust Paralegal provides estate and trust administration services on behalf of Creative Planning Legal under attorney supervision.

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

PRIMARY JOB DUTIES

- Organize, manage, and monitor trust and estate administration deadlines and tasks
- Preparation of legal documents related to estate and trust administrations, including accountings, notices, receipts, and probate pleadings
- Coordinate with clients and asset custodians to obtain and organize asset and debt information for trust and administration cases
- Prepare attorney and transmittal correspondence

REQUIRED EXPERIENCE / QUALIFICATIONS

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

PREFERRED EXPERIENCE / QUALIFICATIONS

- 3+ years of experience in a similar role preferred
- Proficient in MS Office