

## **Estate Planning & Administration Attorney**

The Law Office of Susan Katzen is a Trust, Estates, and Special Needs law firm located in Newport Beach. Our firm provides exceptional personalized legal services and peace of mind that empowers our clients to plan for and protect the two most important things in their lives: the people they love—especially those loved ones with a disability—and the assets they possess to ensure family harmony. Our firm is growing, and we are seeking a positive and compassionate full-time Associate Attorney who is looking for a career position where he/she can grow with a firm, be challenged, and work in a familial and collaborative environment.

We are an entrepreneurial law firm small enough that everyone is a critical part of the team, yet big enough to offer the security and benefits you want. Employees of our firm know the Owner, have daily interaction with our clients, and help us grow the firm. The benefits we provide include annual bar dues, continuing education, professional and personal development opportunities, paid time off, health insurance, and 401K plan with employer matching.

Our ideal Associate Attorney would have demonstrated experience in the following:

- Preparing, reviewing, and editing Accounting Petitions, Petitions for Instructions, Probate Petitions, Conservatorship Petitions, Ex Parte Applications, Declarations, and other pleadings in the area of Probate Law
- Overseeing Court Supervised Trust Administrations, Probate cases, and Conservatorship cases from inception to closure of the case
- Reviewing Probate Notes and Tentative Rulings and addressing the same via Supplements
- Collaborating with the Owner and Senior Associate Attorney to ensure case progress through the pipeline
- Delegating work to paralegals, legal assistants, and law clerks, and monitoring their work
- Leading and participating in initial consultations and client meetings
- Cultivating relationships with the firm's existing and future clients by maintaining consistent and timely communication
- Appearing at hearings, either in person or remotely
- Communicating with Clients and ancillary parties, including but not limited to, Trustees, Financial Advisors, bond companies, attorney firms, and settlement consultants, to provide case status and to obtain information and documentation needed
- Coordinating with the billing department for generating invoices on matters

### Minimum Qualifications

- Two (2) years experience in two (2) of the following areas: Estate Planning, Special Needs Planning, Trust Administration, Conservatorships and/or Probate
- California State Bar license
- Capacity to handle matters and clients independently (after a period of orientation and monitored work)
- Ability to show compassion when dealing with clients
- Talent for winning client confidence and respect
- Willingness to work hard to see that clients receive top-notch service and results
- Strong computer skills with extensive experience using MS Office Suite, timekeeping, and case management software

- Demonstrated ability to collaborate with co-workers and work as a part of a team

### Compensation

\$80,000.00 to \$120,000.00 base per year, plus bonus compensation.

TO APPLY, email a resume and cover letter to [opportunities@skatzenlaw.com](mailto:opportunities@skatzenlaw.com) explaining:

- (1) Why you are interested in the position.
- (2) The top three (3) skills you possess that make you a good fit for the job
- (3) A description of your applicable work experience

Both attachments must be in .pdf format. The subject of the email must read “Associate Attorney – Applicant.”