

SENIOR COUNSEL, TRUSTS AND ESTATES
Job ID 61529
Location: Oakland

Job Posting

For UCOP internal applicants, please login to the internal candidate gateway at: [Jobs at UCOP](#)

Position Base

Oakland

Location

UCOP - Franklin Building

UC OFFICE OF THE PRESIDENT

At the University of California (UC), your contributions make a difference. A world leader producing Nobel and Pulitzer prize recipients with over 150 years of groundbreaking research transforming the world. Choose a career where you can leverage your knowledge, skills and aspirations to inspire and support some of the greatest minds in the world, and those who will follow in their footsteps. Working at the University of California is being part of a unique institution, and a vibrant and diverse community. At the University of California, Office of the President, we propel our mission through impactful work locally, in government centers and systemwide. We are passionate people, serving the greater good.

The University of California, one of the largest and most acclaimed institutions of higher learning in the world, is dedicated to excellence in teaching, research and public service. The University of California Office of the President is the headquarters to the 10 campuses, six academic medical centers and three national laboratories and enrolls premier students from California, the nation and the world. [Learn more about the UC Office of the President](#)

DEPARTMENT OVERVIEW

UC Legal - Office of General Counsel (OGC) delivers ethical, timely, efficient and high quality legal services to the University of California ten campuses, five medical centers, and the Lawrence Berkeley National Laboratory, as well as to the Board of Regents, the President, the Chancellors and other officers of the University. Its services include prosecuting and defending litigation, drafting and negotiating agreements, providing advice, counsel and interpretation of laws, regulations and policies, and assisting with the development of effective compliance and risk mitigation strategies to facilitate the University's complex operations.

POSITION SUMMARY

Reporting to the Senior Principal Counsel of Trusts & Estates, this position works with substantial independence and handles a full range of legal matters and projects, including those which hold substantial importance and impact to the University in the Trusts and Estates field. This position will perform work that is complex in nature, including advising clients on complex legal issues, performing legal research, and negotiating with attorneys or opposing counsel and other professionals. This position also reviews, analyzes, and/or drafts a variety of legal documents, including, but not limited to wills, trusts, fiduciary accountings, financial documentation, notices of proposed action, agreements, releases, waivers, court pleadings, and settlement documents. On a regular basis, this position communicates and negotiates with opposing counsel and fiduciaries regarding legal positions and issues affecting the University's interest in trust and estate proceedings. This position also acts as a liaison and communicates directly with outside counsel on case strategy in trust and estate litigation. This position may also draft petitions and responsive pleadings

SENIOR COUNSEL, TRUSTS AND ESTATES

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and represent the University in contested trust and estate proceedings. Internally, this position provides functional advice, training and/or guidance to paralegals and other staff members in the trust and estate field.

Responsibilities

90% Client Service:

- Contributes to the success of initiatives by providing practical, effective and timely legal advice and counsel on a variety of issues. Utilizes best practices and research methods, while interpreting complex facts and law in areas of high ambiguity.
- Directly negotiates trust and estate matters with fiduciaries, their counsel, and other parties on behalf of The Regents.
- Acts as a liaison with outside counsel in trust and estate litigation.
- Drafts pleadings and agreements and may represent the University in contested trust and estate proceedings.
- Makes recommendations concerning areas of work to perform in-house, at the campuses, versus payment for an outside law firm.
- Meets the diverse legal and business needs and interests of various stakeholder groups and creates and fosters an environment to ensure collegiality and information sharing.
- Establishes strong working relationships and serves as a trusted strategic partner with the University campuses' gift planning offices and other business units, providing practical advice and alternative approaches and solutions to issues affecting gifts from decedent's trusts and estates.
- Represents institutional concerns persuasively to internal and external parties.
- Practices UC Legal's established Values for Principles of Community: collaborative, supportive, respectful of differences, and committed to fairness and diversity in all interactions, both within and outside the team.
- Supports UC Legal's commitment to diversity efforts.

10% Leadership and Administration

- Provides functional advice, training and/or guidance and effectively mentors trust and estate paralegals and other support staff.
- Provides clear expectations to meet expected levels of productivity and accuracy.
- Delegates work effectively to maximize efficiencies.
- Develops objectives and ensures service according to established team and departmental priorities.

Required Qualifications

- Minimum of 5 years of experience in probate and trust administration, including experience in trust and estate litigation.
- Relevant practice experience in a law firm, or in-house counsel for an academic institution, corporation or other entity.
- Proven abilities in collaboration, facilitation, and strategic and creative thinking.
- Trusted partner with senior management and a diverse spectrum of clients.
- Thorough understanding of complex legal issues and ability to foresee implications in a University setting, even when ambiguous or hidden.
- Strong interpersonal communication skills, including proven ability to actively listen, negotiate, persuade and educate.
- Skills to gain trust and build credibility with a broad group of colleagues and clients, to include senior leaders.
- Strong written communication skills and ability to create and deliver effective materials and / or presentations appropriate to a particular audience.

SENIOR COUNSEL, TRUSTS AND ESTATES

Job ID 61529

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- In-depth research skills to draft accurate, complete and persuasive legal documents, such as pleadings, legal responses, affidavits, position statements and briefs.
- Proven decision making ability, even when unpopular, earning credibility and support from colleagues.
- Relied on to represent institutional concerns persuasively to internal and external parties.
- Strong coaching and leadership skills to provide clear expectations, guidance and performance feedback to less experienced attorneys and legal support staff.
- Proven ability to maintain confidentiality and exercise discretion and tact when handling sensitive or potentially sensitive issues.
- Demonstrated commitment to the highest ethical standards.

Education: Advanced degree in related area required.

License/Certifications: Must be a member in good standing of the California Bar. (Out-of-state hire would be afforded time to pass the Bar within a reasonable period.)

Travel Requirements

15% Occasional business Travel may be required.

SPECIAL CONDITIONS

This position has been approved for a hybrid work arrangement. A new hire must reside in or be willing to relocate to California and will be required to report to work onsite in Oakland, CA at least 2 days per week (currently Tuesday and Wednesday).

SALARY AND BENEFITS

Job Title: Counsel 3

Job Code: 000202

Salary Grade: Grade 27

Payscale: \$170,000 - \$192,000, commensurate with experience

Full Range: 129,600 - 254,200

The University of California, Office of the President, is required to provide a reasonable estimate of the compensation range for this role. This range takes into account the wide range of factors that are considered in making compensation decisions including but not limited to experience, skills, knowledge, abilities, education, licensure and certifications, and other business and organizational needs. It is not typical for an individual to be offered a salary at or near the top of the range for a position. Salary offers are determined based on final candidate qualifications and experience. The full salary range shows the growth potential for this position and the pay scale is the budgeted salary or hourly range that the University reasonably expects to pay for this position.

Benefits: For information on the comprehensive benefits package offered by the University visit: [Benefits of Belonging](#)

ADDITIONAL INFORMATION

SENIOR COUNSEL, TRUSTS AND ESTATES

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HOW TO APPLY

Please be prepared to attach a cover letter and resume with your application.

APPLICATION REVIEW DATE

The first review date for this job is **December 5, 2023**. The position will be open until filled.

CONDITIONS OF EMPLOYMENT

Background Check Process: Successful completion of a background check is required for this critical position. [Background check process at UCOP](#)

Smoke Free Work Environment: The University of California, Office of the President, is smoke & tobacco-free as of January 1, 2014. [UC Smoke & Tobacco Free Policy](#)

As a condition of employment, you will be required to comply with the University of California [Policy on Vaccination Programs](#), as may be amended or revised from time to time. Federal, state, or local public health directives may impose additional requirements.

EEO STATEMENT

The University of California, Office of the President, is an Equal Opportunity/Affirmative Action Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, age or protected veteran status. [EEO/AA Employer UC Nondiscrimination Policy](#)

The University of California, Office of the President, strives to make this job board accessible to any and all users. If you have comments regarding the accessibility of our website or need assistance completing the application process, please contact us at: [Accessibility](#) or email the Human Resource Department at: epost@ucop.edu.