

Morgan Law Group - Legal Assistant/Paralegal - Estate Planning

About Us:

Morgan Law Group is a boutique estate planning firm located in Newport Beach. Our dedicated team works collaboratively to provide exceptional service to our clients in a friendly and supportive environment. We value professionalism, teamwork, and dedication to serving our clients with love and care. Join us and be part of a team that encourages professional growth and work-life balance.

Benefits:*

- Holidays
- Vacation
- Growth potential
- Work/life balance
- Friendly, collegial environment
- Bonus program

**Waiting period may apply. Benefits subject to change without notice.*

About You:

We are seeking a legal assistant or paralegal with a minimum of one year of experience in a trust/estate planning law office. The ideal candidate will have experience drafting various estate planning documents, including wills, trusts, powers of attorney, and deeds. Additionally, experience interfacing with clients or conducting client signing meetings is highly desirable.

Responsibilities:

- Using our software to create estate planning documents
- Ensuring documents are prepared for client signing
- Interfacing with clients to follow up and gather missing information
- Conducting client signing meetings
- Assembling binders for delivery to clients
- Collaborating with the attorney to finalize estate plans

Qualifications:

- Minimum 2 years of experience in an estate planning law firm
- Comfortable interacting with clients in person, in writing, and on the phone
- High comfort level with technology
- Strong attention to detail
- Self-starter and self-motivated, able to multitask
- Excellent customer service skills
- Strong work ethic and team player mentality

- Dependability and punctuality are essential
- California notary public preferred but not required

Salary: \$50,000 - \$75,000 Commensurate with skills and experience.

Work Arrangements: Hybrid options available, and part-time will be considered.

Application Process:

To be considered for this opportunity, please submit the following to Bob Zamarra at bobz@atticusadantage.com:

- Detailed resume outlining past positions and tasks performed
- Cover letter explaining why you are seeking a new position
- Completion of the Indeed skill assessment (will be sent upon application)

No phone calls or emails sent directly to the firm will be considered. Only those candidates being considered will be contacted.

If this position aligns with your skills and career goals, we want to hear from you! Join us and become part of a dynamic team dedicated to serving our clients with excellence.

Thank you for considering Morgan Law Group. We look forward to reviewing your application.

Job Types: Full-time, Part-time

Pay: \$50,000.00 - \$75,000.00 per year

Benefits: Paid time off

Experience: Microsoft Office: 2 years (Preferred)

Ability to Relocate: Newport Beach, CA 92660: Relocate before starting work (Required)

Work Location: Hybrid remote in Newport Beach, CA 92660