

## REVISION

### **Trusts, Estates & Probate Attorney**

**Location:** Newport Beach, CA

**Compensation:** \$120,000–\$150,000 DOE

**SIGNING Bonus and PERFORMANCE Bonus eligible**

**Build your future with a firm that's deeply rooted in purpose and client care.** The Law Office of Susan A. Katzen is a respected and growing boutique firm in Newport Beach, CA, focused exclusively on Estate Planning, Special Needs Planning, Trust Administration, Probate, and Conservatorships. We're looking for a dedicated **Associate Attorney with 3+ years of experience** who is eager to deepen their expertise and grow alongside a collaborative, client-centered team.

This is a full-time, long-term opportunity for an attorney who wants to make a meaningful impact while developing a fulfilling career in a supportive, mentorship-driven environment.

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### **Key Responsibilities**

- Draft, review, and edit legal documents including Accounting Petitions, Petitions for Instructions, and Conservatorship Petitions
- Oversee Trust Administration, Probate, and Conservatorship matters from start to finish
- Consult with clients and design Revocable Living Trusts and Special Needs Trusts
- Respond to Probate Notes and Tentative Rulings by preparing Supplements as needed
- Conduct client consultations and maintain clear, empathetic communication
- Supervise and delegate to paralegals, legal assistants, and law clerks
- Represent clients in court hearings
- Coordinate with billing to ensure timely and accurate invoicing

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### **Qualifications**

- 3+ years of experience in Estate Planning, Trust Administration, Special Needs Planning, Probate, or Conservatorships
- Active license to practice law in California
- Proven ability to manage cases independently after orientation
- Strong organizational and communication skills, with sharp attention to detail
- Proficiency in Microsoft Office, timekeeping, and case management software

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- High emotional intelligence and genuine care for clients navigating life transitions
  - In-office presence required; hybrid option considered after training
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## Compensation & Benefits

- **Base Salary:** \$120,000–\$150,000 DOE
  - **Bonus Eligibility:** Year-end performance bonus
  - **Sign-On Bonus:** \$9,000 paid in increments (\$3K at 90 days, 6 months, and 1 year)
  - **Billable Hours:** Reasonable and sustainable billable hour requirement designed to support work-life balance
  - **Vacation:** Generous paid time off
  - **Holidays:** Includes all major holidays and the day after Thanksgiving
  - **Health Coverage:** Medical, dental, vision, and life insurance
  - **Retirement Plan:** 401(k) with 4% employer match
  - **Professional Development:** Continuing education and personal development support
  - **Bar Dues:** Firm-paid annual bar dues
  - **Additional Perks:** Paid parking
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## About the Firm

At the Law Office of Susan A. Katzen, we are a dedicated Trusts and Estates firm committed to guiding clients through life's most personal legal decisions. From special needs planning to settlement planning, our goal is to protect the people and the things that matter most to our clients. We do not handle litigation, allowing us to focus on building thoughtful, compassionate solutions that bring clarity and peace of mind.

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## How to Apply

If this opportunity resonates with you, we'd love to hear your story. Please send your **resume** and a **cover letter** describing why this role and our mission align with your professional goals.

We will personally contact candidates whose experience best fits the position and our firm's culture.

**Kindly, no direct inquiries or agency submissions. Thank you for your understanding.**

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