Job Description

Weston Hurd LLP
100 YEARS
Attorneys at Law
A Century of Legal Excellence

Trust & Estates and Probate Paralegal – Cleveland Office

Position Summary:
We are seeking a knowledgeable and detail-oriented **Trust & Estates and Probate Paralegal** to support our attorneys in all aspects of estate and trust administration, probate proceedings, and related legal matters. The ideal candidate will possess strong organizational skills, a thorough understanding of probate and estate planning procedures, and the ability to manage sensitive client information with discretion and professionalism.

Key Responsibilities:

- Assist attorneys with the preparation and filing of probate documents and petitions in Probate Court.
- Manage estate and trust administration processes, including:
    - Compiling asset information and valuation
    - Preparation of Inventory and Fiduciary Accounts
    - Notifying beneficiaries and interested parties
    - Coordinating with financial institutions and appraisers
- Draft estate planning documents, including wills, trusts, powers of attorney, and health care directives under attorney supervision.
- Prepare and file documents for the transfer of assets, including deeds, beneficiary designations, and assignments.
- Prepare federal and estate tax, gift, and fiduciary income tax returns.
- Conduct legal and factual research related to estate and tax matters.
- Maintain accurate and organized files and calendars to track deadlines and case progress.
- Communicate professionally with clients, court personnel, and third-party service providers.

Qualifications:

- **Education:** Bachelor's degree and/or Paralegal Certificate from an ABA-approved program preferred.

- **Experience:** 2 - 3 years of experience in trust & estates and probate law.
- **Technical Skills:**
    - Proficient in Microsoft Office Suite (Word, Excel, Outlook)
    - Experience with e-filing in courts and taxing authorities

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Key Competencies:

- Strong attention to detail and accuracy
- Excellent written and verbal communication skills
- High level of professionalism and client-service orientation
- Ability to manage multiple deadlines and priorities in a fast-paced environment
- Discretion and sensitivity when handling confidential information

Compensation:
$65,000 - $80,000 / Year