Law Clerk – Wills and Estates

Ain Whitehead LLP

Ain Whitehead LLP is a dynamic, busy law firm located in downtown Barrie. We are seeking an experienced Wills and Estates Law Clerk.

All resumes received will be held in strictest confidence.

Duties include, but are not limited to:

* Drafting Wills, Powers of Attorney, Trusts and other estate planning documents;
* Preparing estate planning documents for execution by clients and attending signing appointments;
* Managing and/or assisting with the organization and maintenance of the Wills’ Vault and addressing all requests pertaining to storing or retrieving Wills and other estate planning documents;
* Organizing and attending meetings for execution of documents;
* Preparing applications for Certificates of Appointment of Estate Trustee;
* Managing advertising for creditors;
* Preparing Estate Trustee/guardian/attorney accounts: all in court passing format;
* Assisting in assembling information on assets and liabilities for estate administration purposes, including correspondence with financial institutions, CRA, executors, beneficiaries, and others;
* Preparing releases, receipts, directions and other documents routinely used in estate administrations;
* Managing on-going record keeping and preparing timelines and task lists for estate administrations;
* Preparing Estate Information Returns;
* Communicating with banks, investment advisors, accountants and others in the administration of Estates;
* Preparing file reporting letters;
* Engaging in file management (e.g. opening files, file reviews and etc.);
* Contacting clients for scheduling and information gathering;
* Preparing, and editing emails, correspondence, memoranda, reports, authorizations and directions, retainers, forms and other documentation;
* General administrative duties, including but not limited to scanning, filing, printing, photocopying, scheduling appointments, generating billing reports, performing administrative duties with respect to opening and closing files, etc.;
* Answering the telephone, taking messages and providing routine information to callers;
* Other duties as assigned.

Required skills:

* Minimum 3 years’ experience in Wills and Estates law
* Law Clerk Diploma;
* Highly organized, detail-oriented with strong proofreading skills;
* Strong verbal and written communication skills;
* Ability to work well under pressure and to work well in a team environment;
* Ability to manage multiple priorities while paying attention to detail;
* Confident and dependable, with strong initiative and ability to work both independently and in a team-oriented atmosphere;
* Technical skills (MS Office, Estate-a-base, PClaw);
* A professional attitude and commitment to confidentiality is essential.