



JOB DESCRIPTION

JOB TITLE: Information Integrity and Governance Specialist

REPORTS TO: Director of Estate Planning Services **JOB CODE:** Full Time - Hourly

JOB PURPOSE:

The purpose of this position is to work directly with attorney, team, and clients to ensure the accurate collection, management and use of the data and information necessary for a customized, comprehensive estate plan and positive estate planning experience.

The Information Integrity and Governance Specialist will be directly involved with the initiation, development, production, and presentation of each Estate Plan, and will act as a client relationship ambassador for the lifetime of the client.

This role will focus on providing the highest level of information management and estate planning experience to all O'Donnell Law Center clients.

EXPECTATIONS OF EMPLOYEE

- Understand that our clients are our first priority.
- Embrace our Law Centers culture of warmth, positivity, compassion, and empathy.
- Adhere to all policies and procedures.
- Act as a role model within and outside the organization.
- Interact professionally with team members, supervisors, clients and the public
- Communicate appropriately with clients and colleagues at all levels.
- Consistently report to work on time prepared to perform duties of position.
- Meet organization productivity standards.
- Seek to continually upgrade skills and knowledge.
- Demonstrate good judgment in investigating problems and making decisions.
- Maintain strict confidentiality regarding matters of the Law Center and clients.
- Maintain an appearance appropriate for the position and situation.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Support all aspects of the client intake information and data collection process.
- Review client information and work with clients, attorney and other team members to obtain any missing, incomplete, or unclear information or documentation to support the design and production of trusts, asset inventories, wills, powers of attorney, deeds and health care documents.
- Participate in attorney-client meetings.
- Organize and input client data and information into client data and drafting platforms.
- Conduct due diligence, quality assurance and follow through on all aspects of information needed for the estate planning documents.
- Work closely with team members to communicate accurate and complete information at all times.
- Facilitate, execute, and control all aspects of the client document signing ceremony.
- Welcome clients to the office for appointments and document exchanges.
- Facilitate on-going and positive relationships and communications with clients who are in the trust funding stage and the review and update stage of their estate planning, and beyond.
- Work with attorney to finalize client conversions including execution of engagement agreement and collection of engagement fees.
- Notarize legal documents as necessary.
- Participate in and contribute to project management meetings, team meetings, trainings, and education.
- Create family trees from client information and prepare each prospective client matter for an initial working meeting with the attorney.
- Coordinate all phases of document preparation with drafting department.
- Manage all aspects of client Estate Planning Portfolio fulfillment.

ADDITIONAL DUTIES AND RESPONSIBILITIES

- Organize and maintain office.
- Remain current on latest improvements in hardware and software that would be beneficial to the practice.
- Prepare office space, technology and client data for attorney and client meetings.
- Inventory, order, receive, and stocks all office supplies.
- Perform any other related duties as assigned.

QUALIFICATIONS

- BA/BS degree preferred or any combination of experience and training which provides the necessary knowledge, skills, and abilities.
- Thorough knowledge of office administration functions and responsibilities
- Ability to identify and analyze complex issues or problems to recommend and implement solutions.
- Exceptional interpersonal skills; able to interact skillfully and courteously with team members, attorneys, clients, and the public.
- Strong written and verbal communication skills.

- Exceptional organizational skills.
- Strong computer, typing and data entry skills with proficiency in Microsoft Office 365 and the ability to master new software programs.
- Basic understanding of trusts, wills, power of attorneys, and health care documents.
- Work occasionally requires a high level of mental effort and flexibility. Must be able to perform the duties of the position with time constraints and interruptions while under pressure.
- Ability to handle difficult situations and maintain important deadlines and schedules.
- Ability to think logically and follow written, verbal, or diagrammatic instructions.
- Ability to make appointments, compose original correspondence, and have substantial contact with clients.
- Ability to appropriately address issues involving complex and confidential information.
- Considerable knowledge of modern office procedures and practices, an ability to operate computer hardware and software in an efficient and effective manner, and a desire to continually learn new software, procedures and practices.
- Ability to work independently and make sound decisions.
- Proficient use of English vocabulary and mastery of the written language.

LANGUAGE SKILLS

- Ability to read, analyze, and interpret information.
- Ability to effectively present information to clients, attorneys, and team members
- Ability to produce business communications effectively, with proper grammar and punctuation.
- Excellent written and verbal communication skills required

WORKING CONDITIONS

- Normal office environment with little exposure to excessive noise, dust and temperature.

Responsibilities and tasks outlined in this document are not exhaustive and may change as determined by the needs of the Law Center.