

LAW OFFICE
RUTHANN P. LACEY, P.C.
Concentrating in Elder and Special Needs Law

**3541-E Habersham at Northlake
Tucker, Georgia 30084**
Telephone: (770) 939-4616 • Facsimile: (770) 939-1758
www.elderlaw-lacey.com

Job Description: Administrative Assistant
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ABOUT THE FIRM: A traditional law practice is focused primarily upon functional expertise in a narrow legal practice area. The law firm of Ruthann P. Lacey, P.C. is involved in the practice of Elder and Special Needs Law which is a highly specialized area of the law. Our firm is client-centered and focused on the unique legal needs of the elderly, their families, and individuals of all ages with special needs. Our areas of legal services include: Disability Planning; Durable Advance Directive for Healthcare; Durable Financial Powers of Attorney; Guardianship and Conservatorship; Health Law; Independent Living Options; Long-Term Healthcare Options and Financing; Medicaid Estate Recovery; Medicaid Applications and Planning; Medicare Set-Aside Arrangements; Nursing Home Issues; Probate and Estate Administration; Real Property; Revocable and Irrevocable Trusts; Special Needs Trusts; Supplemental Security Income (SSI) Issues; Trusts and Wills; and VA Aid and Attendance Benefits.

Administrative Assistant position overview and requirements: Responsible for answering telephone; assisting clients, callers, guests, and firm members; preparing for client appointments; communicating with clients and firm members; maintaining accurate records; and supporting the firm's "Vision and Mission".

The person in this position:

1. Is able to work a regular full time weekly schedule
2. Does not manage others
3. Possess's a professional appearance and demeanor
4. Is comfortable as primary responder to heavy telephone work in a busy legal practice
5. Has a good command of business writing and basic math skills
6. Has exceptional client skills, a desire to help others, and is comfortable working with older people, people with disabilities, their families, and other professionals
7. Is a quick learner; has a good sense of humor and is optimistic
8. Uses common sense and independent judgment as a member of our legal team
9. Is proficient in Windows, Word Perfect, Amicus, Hot Docs, Adobe Acrobat and the Internet
10. Is a problem solver and independent thinker who is flexible in multi-tasking
11. Will be available for occasional evening or weekend time at educational, team building, or speaking events for the firm
12. Will perform duties while maintaining the highest standard of confidentiality for the firm's clients
13. Will pass a background check
14. Has a valid Georgia driver's license and reliable vehicle as some local travel may be required
15. Will report directly to the manager assigned by the firm

Administrative Assistant job description breakdown by daily responsibilities:

Telephone:

- 1. Primary responder to answer telephone**
- 2. Responsible for bringing telephone on line at office opening and placing telephone on night service at office closing**
- 3. Record and implement greetings on voice mail system**
- 4. Maintain telephone section in employee instruction manual**
- 5. Set up and instruct new employees on using the telephone system**
- 6. Assist callers and clients with information regarding services of the firm**
- 7. Schedule and calendar appointments and verify that calendar and appointment confirmations are in agreement**
- 8. Transfer calls as instructed and as appropriate**
- 9. Retrieve Digital and BellSouth messages in general and attorney mail boxes; return calls or forward to intended recipient in firm**
- 10. Confirm all scheduled appointments (for clients, vendors, and professionals) by telephone two business days in advance**
- 11. Communicate by telephone with clients, courts, and other professionals regarding client matters as instructed; document and report results and outcomes to appropriate party**

Reception:

- 1. Open office: make sure door is unlocked and the porch and walk are clean and tidy; turn on all interior lights and ensure they are working; turn on music at appropriate level**
- 2. Monitor and maintain office public areas and keep neat, clean and tidy throughout the day (reception area, refreshment area and rest rooms)**
- 3. Cheerfully greet arriving clients and other visitors**
- 4. Offer and serve beverages**
- 5. Notify appropriate staff of the arrival of their client or visitor**
- 6. Replenish printed materials and articles in reception and public areas**
- 7. Maintain inventory of printed materials and articles to ensure supplies do not run out**
- 8. Maintain and restock bar refrigerator, provide clean glassware for clients, and remove used glassware to kitchen dishwasher**
- 9. Ready conference areas for client appointments as needed**

Office Administration:

- 1. Retrieve incoming mail from mailbox daily**
- 2. Scan appropriate client information to the proper location of client file for team members**
- 3. Process the mail and promptly deliver "hard copy" to appropriate "team member's in box"**
- 4. Collect morning and afternoon correspondence materials from team members to process outgoing mail**
- 5. Appropriately produce, package and place correct postage materials for outgoing mail**
- 6. Promptly deliver to USPS collection box or to FedEx drop box as appropriate**
- 7. Check daily and restock paper and other staple items in work room and all other offices**
- 8. Maintain and report inventory to manager for reorder to ensure supplies do not run out**
- 9. Filing daily as required to keep filing system orderly and current**
- 10. Develop office forms and procedures as necessary; recommend improvements in systems, procedures, client service, etc.**
- 11. Responsible for maintaining firm's library**
- 12. Other administrative responsibilities for support of team members as assigned**

Client Administration:

1. Maintain complete confidentiality for all client matters and comply with privacy act
2. Maintain current client and contact information in internal records
3. Produce and mail appointment letters
4. Open new client files:
 - Hard file - have complete paperwork in file
 - Computer file - set up file profile and include electronic copies to complete file
5. Prepare and maintain inventory of new client appointment packages, burgundy folders, and new client folders
6. Assist as witness in signing appointments as scheduled
7. Prepare "original document" package for client to take with them as they leave the signing appointment
8. Scan copy of client's original signed documents to client file
9. Print and mail after appointment and referral letters
10. Compose and mail personal notes (thank you, sympathy, etc) as required
11. Other administrative responsibilities for support of client as assigned by firm

SUMMARY: The above description is intended for general information purposes for the job requirements and duties of the Administrative Assistant's position. This is a dynamic position requiring the ability to demonstrate flexibility in multi-tasking and the use of common sense through understanding of our firm's policies as a member of our legal team. The person in this position will be able to meet established firm standards of professionalism while supporting Attorneys, Paralegals, and other staff members as we achieve specialized complex planning for our clients.