

LAW OFFICE
RUTHANN P. LACEY, P.C.

Concentrating in Elder and Special Needs Law

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Job Description: Paralegal
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ABOUT THE FIRM: 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.

PARALEGAL POSITION OVERVIEW AND REQUIREMENTS: Responsible for drafting legal documents and for professional presentation in communicating with clients and other professionals on behalf of the firm through seeking to achieve the firm's "Vision and Mission."

The person in this position:

1. Will pass a complete background check, consisting of credit, criminal and driving reporting
2. Will qualify for dishonesty bond coverage and sign Red Flag Rules for confidentiality
3. Is able to work a regular full time weekly schedule and be punctual
4. Possess and project professional appearance, dress and demeanor
5. Is comfortable with heavy telephone work in a busy legal practice
6. Has a superior command of business writing and basic math skills
7. Has exceptional client skills, a desire to help others, and is comfortable working with older people, people with disabilities, their families, and other professionals
8. Is a quick learner; has a good sense of humor; and is optimistic with an up beat outlook
9. Uses good common sense and independent judgment as a member of our legal team
10. Is proficient in Word Perfect, Amicus Attorney, Hot Docs, Windows, Excel, Power Point, proficient in research as required through use of codes and the internet
11. Is a problem solver and independent thinker who is flexible and good at multi-tasking
12. Will be available for evening or weekend time at educational, team building, and speaking events for the firm
13. Will perform duties while maintaining the highest standard of confidentiality for our clients
14. Does not manage others
15. Has a valid Georgia driver's license, a reliable vehicle and current insurance, as some local travel may be required
16. Will report directly to the manager assigned by the firm

Paralegal: Job Description breakdown by daily responsibilities and duties:

Telephone and communications:

1. Answer telephones in a busy legal office
2. Assist callers with information regarding services of the firm
3. Operate Digitel voice mail system and process calls from assigned lines promptly/correctly
4. Communicate by telephone and email with clients, courts, and other professionals regarding client matters as instructed, document and report results and outcomes to appropriate file
5. Schedule and calendar appointments and generate and process paperwork

Office Administration:

1. Be cheerful, upbeat and polite when dealing with other staff, clients and visitors to the office
2. Prepare office and conference areas for meetings and reset up area when finished
3. Maintain current client and contact information and other internal administrative records
4. Initiate communication regarding client matters as assigned by the attorney
5. Remain current with office procedures and office machines and their operations
6. Remain current with word processing systems, such as, Word Perfect, Amicus, Hot Docs, Windows, etc
7. Contribute to developing office forms and procedures as necessary; recommend improvements in systems, procedures, client service, etc.
8. Other administrative responsibilities and instruction to support of Attorney, fellow Paralegal, and administrative staff

Client Administration:

1. Maintain complete confidentiality for all client matters and comply with privacy act
2. Responsible for client matters as assigned by attorney, including communication, drafting documents or petitions, meeting deadlines, etc.
3. Draft legal documents for attorney review; including, Powers of Attorney, Last Will and Testament, Deed, Trust, Guardianship and Conservatorship petitions, and Medicaid, other benefit applications and VA applications, along with other documents
4. Draft documents for Probate and Estate administration, notices, and client and court letters. File paperwork with the court and government agencies and follow-up with client and courts. Assist clients appointed as executor, administrator, or trustee as assigned by attorney
5. Print draft documents and send to client as instructed. Initiate follow-up contacts to address and respond to client questions or concerns regarding their documents and involving and reporting to attorney as necessary
6. Print and assemble original documents for execution by client and schedule, conduct, assist in signing appointments, and act as witness or notary as necessary. Prepare original document package for delivery to client
7. Record deeds and/or memos of trust and follow up with court and client to ensure that documents are properly recorded and originals returned to client
8. Other administrative responsibilities for support of client as assigned by attorney or manager

SUMMARY: This description is intended for general information purposes for the job requirements and duties of the Paralegal's position. This dynamic position requires the ability to demonstrate flexibility in multi-tasking and through understanding of our firm's policies as a member of our legal team. The person in this position will meet established firm standards of professionalism while supporting attorneys and other paralegal and staff members as we achieve specialized complex planning for our clients.