

Position Information	
Working Title:	Lead Probate & Trust Administration Assistant
FLSA Status:	Non-Exempt
Provisional Period:	90 Days
Department:	Probate & Trust Administration
Assignment Category:	Staff
Office:	Fort Myers
Job Type:	Regular, Full-Time
Job Description Summary:	<p>The Lead Probate & Trust Administration Assistant must be alert, curious, responsive assistant to handle probate and trust administrations. The Probate & Trust Administration Assistant is primarily responsible for opening files, communicating with clients, beneficiaries and other professionals, while creating legal pleadings, writing letters and taking file from inception to completion. Must be a self-managing individual. We have excellent probate/trust admin systems and processes in place that make it so you should not require daily direction on what should happen next with a file. Our office uses Microsoft Office, TimeMatters and ProDocs software among others. We use Trello and Slack for intra-office file progress and communication. In addition to these responsibilities, the Lead Probate & Trust Administration Assistant is also responsible for supervising the Probate & Trust Administration Assistant Department Staff, training new Probate & Trust Administration Assistants and leading departmental meetings and innovation. Adaptability and flexibility will qualify you as an exceptional candidate. Attributes that will shine are alertness, curiosity, and responsiveness.</p>
Job Factors	
Minimum Education Preferred:	Bachelors Degree
Experience Level Preferred:	Five years of relevant probate, trust administration and/or estate planning experience preferred.
Supervision Received:	The incumbent reports to the Probate & Trust Administration Associate Attorney. After initial orientation, the incumbent will be given general direction from the Probate & Trust Administration Associate Attorney, but is expected to perform duties and resp
Supervision Exercised:	This position is responsible for supervising the members of the Probate & Trust Administration department.
Scope of Human Resources Impact:	Often responsible for taking lead on interviewing prospective candidates and providing final input into the hiring process.
Level and Nature of Internal Contacts:	The incumbent has regular contact with all members of the team, including all levels of Attorneys and outside vendors. This position also

	includes leading meetings for the Probate & Trust Administration department and providing direction to said department's team.
Level and Nature of External Contacts:	This position requires regular external contact with clients and Centers of Influence to streamline and better the probate and trust administration process.