

Position Information	
Working Title:	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 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. 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:	Three years of relevant probate, trust administration and/or estate planning experience preferred.
Supervision Received:	The incumbent reports to the Lead Probate & Trust Administration Assistant. After initial orientation, the incumbent will be given general direction from the Lead Probate & Trust Administration Assistant, but is expected to perform duties and responsibilities
Supervision Exercised:	This position is not responsible for supervising any staff positions.
Scope of Human Resources Impact:	Not responsible for interviewing prospective candidates or playing a role in 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 even outside vendors.
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.