

Are You the One?

Paralegal: Probate, Estate Planning and Elder Law

Full-Time. Starting \$18 – \$30 /hr.

Estate Planning and Elder Law firm with offices in Oregon, WI, **Brookfield, WI**, and Madison, WI is looking for an **experienced**, level-headed, A++ **Paralegal** to join our team.

Instructions for application are at the end of this document.

We are a law firm dedicated to providing our clients with the best-damned estate planning, elder law, and probate services possible. We do this by living by our five **Core Principles** of:

Love, Compassion, Integrity, Teamwork, and the constant **Pursuit of Excellence.**

Our founder, a retired Army JAG officer, leads this small but quickly growing boutique practice. We want members on our team who are fierce, strong, and compassionate as well as ethical, professional, and trustworthy. You must be committed to helping others and want to be a part of something extraordinary. This position is ideal for someone looking for long-term potential and not just a steppingstone. While we are still small, the potential for your growth is huge.

Estate Planning is Crucial

You want to be a happy paralegal? You want money? You want to earn the respect of your peers? You want work life balance to be with your kids? Our firm wants those things for you, too. You help the firm achieve its goals, and it will help you achieve yours.

We are seeking a **full-time** paralegal to work in our **Brookfield** office but would consider a hybrid/remote schedule. You would probably spend some days in the Oregon, WI office in the first couple of months for onboarding and training on our systems. Also, for quarterly all-staff meetings.

Breaking the Mold

You will be investing yourself to grow a firm and create a culture that will break the mold and change people's lives. You believe: "good enough" sucks; you want to push harder and achieve more.

You must understand and embody our **Core Principles**. We want referrals from clients who become raving fans, not repeat business from miserable ones. We want to deliver

an experience that is above and beyond the norm. We want you to be so awesome that you have a cult of raving fan clients.

Our Systems

We have software and systems for our probate process as well as our trust administration services. You would be working with other paralegals to improve the processes to make the client experience as good as it can be.

We have written forms and procedures for the estate planning process. You must be willing to fully adopt our existing systems but also help us continuously improve them.

You will have measurable benchmarks on a weekly, monthly, and quarterly basis.

You must be familiar with drafting estate planning documents and trust funding. You will be in constant communication with our clients and help the attorneys prepare for client meetings.

Pay

Pay is at or above market including the ability to earn bonuses. The starting base salary will be \$18 to \$30 hourly depending on experience, and your ability to work in-office. In-office workers are more valuable to us because we need people to help with our client signings, and hospitality. You will be part of our monthly bonus program, plus benefits.

Requirements

If you believe that this is the “home” you’re looking for – a place where excellence is rewarded, where you can be significant, and where you love coming to work every day – then please apply. If you hope for a position where you can put in minimal effort, please don’t waste our time. Life is short.

If this ad was too vague or boring for you, then below is a more detailed list of qualifications.

Keep in mind that even though we’ve specifically asked only excellent people to apply, not-so-excellent people will inevitably still apply. So, we’ve devised a series of tests to weed those people out. If you are as serious about this position as we are, then you’ll follow it through to the end. If not, then let’s all be glad we figured that out now rather than later.

Qualifications

- Excellent communication skills, confidence.
- Integrity and professionalism.

- Detail focused and able to proofread and draft for precision of meaning.
- College degree and/or paralegal degree from an accredited school, or extensive experience as a paralegal, legal assistant, or legal secretary.
- Mastery of Windows 10/11, MS Word, MS Teams, Excel, Adobe Acrobat. Tech native, can troubleshoot minor computer issues without help.
- Knowledge of and experience in drafting documents for attorneys, filling out and filing forms related to probate cases.
- Organized and **detail-oriented**.
- Able to manage calendar, internal and external deadlines.
- Able to communicate calmly and clearly with stressed clients.
- Excellent drafting and writing skills.
- Common sense.
- Self-starter, resourceful, compassionate, responsive, adaptable, excels at most things.
- Pass a background check and be bondable.
- Must be a Wisconsin notary public or able to become one within 4 weeks after starting the position.
- Desire to help others and create something significant.

General Duties

- General paralegal duties, including supporting attorneys and other members of the team as needed.
- Tracking your time – Your time may be billed by the hour, or may be for clients paying flat fees. Even non-hourly work needs to be tracked to be sure we can track if people are overworked and if our cases are profitable.
- Meeting with clients in person and via video or phone to gather information and guide them through their issues.
- Reporting to clients on the status of their cases.
- Communicating professionally verbally and in writing with clients, attorneys, our team, and everyone else.
- Maintaining files, opening files, closing files, copying, scanning, etc. according to established procedures.
- Attention to internal deadlines.

Estate Planning Duties

- **Drafting client documents** like wills, trusts, and powers of attorney using an online state-of-the-art drafting system and in-house drafting forms.
- Review drafted documents and make custom revisions to ensure they meet client needs and high standards and specifications of the clients, the firm, and the attorneys.
- E-filing with courts and deed recording online.
- Maintaining calendar, deadlines, and reminders for all estate planning cases.
- Prepare and file real estate deeds.
- Organize financial information and prepare financial transfer documents.

- Preparing long and complicated Medicaid applications with precision and clarity.

Probate Duties

- Drafting court forms accurately.
- Obtaining client or attorney signatures.
- Electronic filing of documents with the court.
- Answer client inquiries.
- Communicate with banks, title companies, tax accountants, real estate agents, other businesses and individuals in a professional and discreet manner.
- Help with litigation and mediation preparation:
 - Bates stamping exhibits.
 - Research and drafting first drafts of briefs or petitions.
 - Trial notebooks.
 - Witness preparation.
 - Attending hearings and assisting as needed.
- Collect data regarding the decedent's assets such as cash accounts, retirement, and real estate holdings.
- Account for the assets of the estate or trust accurately and produce inventories and accounting documents to report to the court and the interested parties the financial status of the cases.
- Arrange for paying expenses of an estate or trust in a timely way.
- Negotiate with creditors of the decedent to reduce the amount of payments.

We Value Our Team and Offer The Following

This position has competitive compensation, a good work-life balance, and opportunities for career growth. We offer a Retirement Plan with an employer contribution. Paid holidays and PTO for employees who work full-time.

- Health Insurance (SSM - company contribution toward plan)
- 401(k) company 3% contribution after probation period.
- Paid Holidays
- Paid Vacation / Sick Time
- Life Insurance
- Dental & Vision available

So are you ready to apply for your dream job? Are you willing to roll up your sleeves and enjoy assisting in the practice of law? If so, please contact us by following the instructions below. (Hint: these instructions are a test to weed out the unqualified).

HOW DO I APPLY?

Please note that your ability and willingness to follow these instructions explicitly will play a big role in whether you will be considered for this position. Do not use the reply

option on this ad. Email the following documents to the email address jobapplicants@friendly.law, in PDF format only. The email subject should be "[your full name, spelled backwards] is your Paralegal" in the subject line:

1. Your résumé.
2. Cover letter in 12 pt. Georgia font, normal letter format addressed to Atty. Dan Krause at the firm's Brookfield, WI address below, including the following in bullet-point format:
 - How can you deliver value to a client going through probate of their loved one?
 - How can you deliver value to an elderly client unsure about their future?
 - What are you looking for in this position, financially, professionally, and personally?
 - What did you like and did not like about this ad? (You can be honest; we will not hold it against you).
 - Name one great movie you have seen or book you have read in the last twelve months, and why you liked it so much.

Thank you for taking the time to consider joining our team!



KRAUSE ESTATE PLANNING
& Elder Law Center

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