



Client Services Assistant / Paralegal – Northern Colorado

Rewarding opportunity with an established and quickly growing
Trust and Estates Fiduciary Services Company

Are you . . .

- ✓ Fulfilled in serving others?
- ✓ Driven to make a difference?
- ✓ Known for your reliability and integrity?
- ✓ Looking to primarily work remotely?
- ✓ Burnt out from billable hour requirements?

If so, this position in the Trust and Estates / Wealth Services industry is for you.

The Company:

The Trustee Services Group is a professional service company specializing exclusively in the delivery of trust and estate fiduciary services. We strive to transform the trustee services industry through the delivery of customizable, responsive, beneficiary focused professional fiduciary services. We collaboratively serve families and their professional advisory team.

The Position:

We're looking for a well-respected member of our local community whose proven responsibility and reliability justifies the right to work from home.

The position is full-time. Compensation is negotiable depending on experience.

Requirements:

- Communication: professional correspondence – verbal and written
- Proven clear thinker, well organized, levelheaded, solution oriented
- Self-starter, efficient, productive, collaborative and works well with a team
- Great interpersonal skills
- Reliably works independently
- Experience in customer service, sales force, financial services and/or trust administration a plus
- Confidence in working with numbers and organizing information
- Paralegal experience in Estates and Probate preferred

The Location:

Northern Colorado - Although Trustee Services Group has offices in Colorado Springs, Denver, and Ft. Collins the successful candidate **will work primarily from home but must be able to attend meetings in Fort Collins as needed.**

Why should you apply?

- Rewarding career
- Remote working opportunity
- Dynamic, growing company

If this job is for you . . .

- Email MarySueP@TrusteeServicesGroup.com
- In email subject line put "Client Services Paralegal: Ft. Collins".
- Submit your resume as a PDF attachment.
- Include a cover letter.

We will contact you by phone or email within two weeks of submission, but only for qualified applicants, which we hope you are!

Client Services Paralegal Position Responsibilities

The responsibilities, skills and qualities required of the position include:

- Strong telephone skills
- Computer skills including running reports, familiarity with Word & Excel
- Update Database/Data Entry
- Scanning Documents
- Organizational skills
- Manage account on-boarding touch points
- Maintain accurate and organized online/electronic files
- Online cloud management including tracking Trusts and Estates
- Process needed paperwork for banking, financial institutions, and CPAs
- Communicate with Attorneys, Financial Advisors, CPAs, clients, and staff
- Follow-up on client requests
- Document preparation regarding trusts and estates
- Run internal reports and calculations
- Attend weekly staff meeting – either Zoom or in-person
- Attend meetings in-person in Ft. Collins as needed