Title: Estate Planning Attorney

Location: California

Job Description: **JOB SUMMARY**

The Estate Planning Attorney's primary responsibility is to help a client complete an accurate estate plan that fulfills the client's wishes in an efficient fashion, specifically by being available for a 'start' meeting within 5 business days, setting the signing meeting at the end of the start meeting, walking through the documents with the client during the signing meeting and owning the process through client signatures. A highly successful estate planning attorney has a high ratio of conversions from initial call to signatures.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Serves as the primary point of contact for estate planning clients
- Answer client questions within same day or same day offer timing of response
- Ask clients for referrals to grow practice beyond wealth management referrals
- Refer CPL clients not referred by CP to CP for wealth management
- Uses legal expertise to assist in the creation and implementation of estate plans
- Displays a positive attitude and willingness to adapt in a rapidly changing environment
- All other duties as assigned

REQUIRED QUALIFICATIONS / EXPERIENCE

- Juris Doctorate
- Licensed and in good standing with the bar of California
- 5-7 years of estate planning or other relevant experience
- Ability to present complex estate planning concepts to clients
- Ability to draft and review estate planning documents with a great degree of accuracy

PREFERRED QUALIFICATIONS / EXPERIENCE

- LL.M. in tax or estate planning
- Licensed and in good standing with the bars of more than one state

TECHNICAL SKILLS

- Proficiency in Microsoft Office preferred

Salary range: $110,000 - $130,000