



Unruh Turner Burke & Frees Job Description

JOB TITLE: **Administrative Assistant** DEPT. NAME: **Trusts, Estates & Wills –
Phoenixville Office**

Our law office receives over seventy-five (75) potential new client inquiries per month and provides legal services and estate/elder law planning to hundreds of new and existing clients each year. We are seeking someone who can help our team and our clients.

To do this job well and to enjoy it, you must be detail oriented, an excellent communicator, and a good listener. Clear, friendly and concise communication by phone is critical to your success and your enjoyment of this position. This position is full time, in office (Not Remote) and 9 am to 5 pm, Monday through Friday – 37.50 hours per week. Prior legal office experience preferred but not required. Ongoing training is provided. Attention to detail, willingness to use and to follow systems, and the desire to be an integral part of a legal team and a client centered focus are all essential. Good work habits, and self-management are also essential and valued but we are very experienced at training you to excel at the specifics of the job. People who have thrived in this job consider themselves to be “careful,” “thoughtful,” “very friendly” “dedicated to accuracy,” and “happiest when I work on things that matter.” They do not use social media in the office and realize that they are part of a team effort.

Our practice section is a small but very well established, busy, practice section of a larger Chester County law firm employing extraordinary people. The office culture offers a no nonsense work environment where co-workers are friendly, warm, and care about one another but are not distracted by office politics, competition, or social cliques. We are too small, too busy, and too focused for that. There is a strong commitment to one another on the team, to client relations, client satisfaction, and the total client experience and your job represents an important part of that.

Essential Skills (Don't apply if you won't blow us away on these):

- Great phone and people skills
- Typing Skills
- Excellent with Microsoft Office and experienced in use of AI or open to training
- Willing to help support client relations managers, paralegals and lawyers on the team.
- Answer and screen telephone calls and take messages as necessary.

Primary Responsibilities:

Administrative Assistant to two Attorneys

Working to assist two attorneys on the team with everyday tasks including, but not limited to:

- Letter writing
- Client correspondence
- Client Calls
- File maintenance
- Enhance efficiency

Payments and Processing Signed Documents

- Review and return files to assigned paralegal for needed revisions
- Scan and upload documents to portal
- Create cover letters for attorney review

- Prepare client binders of signed documents
- File original documents to safe deposit + update database (if requested)
- Communicate with clients for follow-ups and out-of-office signings
- Send emails at various stages of work
- Process billing as needed (LAWPAY)

Terminating File Project

- Organize and sort files that need to be scanned
- Update databases
- Call clients regarding termination of files
- Terminate files
- Prepare documents to be mailed out

Miscellaneous Administrative Tasks

- Filing
- Update client contact information in systems
- Refill copier/restock copy paper
- Check conference room and refill pens/snacks in the morning
- Shredding documents to basement
- Prepare and drop off outgoing mail
- Trash collection (all staff does this)
- Print checklists and reports as needed
- Answer the phone, and direct calls for sophisticated clients ranging in age from 40's to 70's
- Greet clients in person as they arrive and help to create a warm and welcoming experience
- Prepare client files for attorney meetings according to a checklist – accuracy is really important
- Responding to requests for information from clients and prospects

The Type of Person We are Looking for is:

- Nice, friendly. Good with people and likes to help people by being able to sell them what they really need
- Prompt, detail oriented, and reliable. Well Organized
- Trustworthy (will deal with highly confidential issues; involves a non-disclosure agreement)
- Responsible & a Self-Starter who finishes jobs
- Focused
- Can go for several hours at a time without using a personal cell phone -- IMPORTANT!
- Has a strong work ethic and is a team player willing to help
- Wants to work in the office in a team setting and is not looking to work from home
- Compensation will be determined by your skill levels and/or prior experience.
- You can read more about our office here: www.paestateplanners.com

Benefits:

- 401(k)
- 401(k) Employer Safe Harbor Non-Elective Contribution (you will receive this benefit regardless of your own deferrals)
- Dental insurance
- Flexible spending account
- Health insurance
- Health savings account
- Paid time off
- Vision insurance

Schedule:

- Monday to Friday

Supplemental Pay Types:

- Potential Bonus Pay

Location:

- Phoenixville, PA: Reliably commute or planning to relocate before starting work (Required)

Education:

- High school or equivalent (preferred).

Experience:

- Microsoft Office: 2 years (preferred)
- Clio (a plus)

Work Location:

- In person

Unruh Turner Burke & Frees is an equal opportunity employer.

Unruh Turner Burke & Frees is not accepting unsolicited assistance from search firms for this employment opportunity. Please, no phone calls or emails.