

Law Clerk - (18 Month Maternity Leave Contract)

77 City Centre Drive, West Tower, Suite 300, Mississauga, Ontario L5B 1M5 • 1.800.323.3781 • www.pallettvalo.com

Primary Function:

Reporting to the Wills, Estates and Trusts Practice Group Head, this position is responsible for preparing wills, powers of attorney, preparing reports and other related documents, supervising the maintenance and updating of the wills database. This position also provides some administrative assistance in the estates area, as directed. This function has billable targets; must docket as per docketing policy and must meet billing cycle requirements.

The successful candidate should have a minimum of five (5) years of recent wills drafting experience. Superior attention to detail, strong organizational skills and a mature work ethic are important as is a customer service focus and the ability to multi-task in a fast paced work environment. This is a 18 month maternity leave contract position, with the possibility of permanent employment. The ideal candidate will be driven, eager to learn and grow while taking initiative to produce quality work with pride.

Job Duties and Responsibilities:

- Performs legal administrative work of a responsible and confidential nature for multiple lawyers.
- Organizes and expedites lawyer's flow of lawyers work, initiating follow-up action.
- Acts as liaison between principal and various internal and external individuals, groups and clients at all levels.
- Corresponds with clients, finance and other institutions in a timely and efficient manner without requiring the lawyer's attention and initiates follow up actions as required.
- Exercises initiative and judgment to relieve principal of administrative detail.
- Guide junior assistants with maintenance of office files/records in accordance with office procedures
- Maintain tickler system with timely follow-up by lawyer, as appropriate.
- Commissioner of Oaths.
- Other duties as may be required.

Wills and Powers of Attorney:

- Communication with clients: Review Guide to Will & Estate Planning submitted by clients and obtains from client any additional information needed. Obtain required documents from clients, finance and other institutions. Responding to client inquiries, assist client to interpret and understand legal documents and answer basic questions. Forward questions of legal advice to appropriate lawyer. Arrange appointment for execution of documents including scheduling of witnesses, instruction junior assistant/witness about documents to be executed (copies, database entry and filing).
- File processing: Responsible for all aspects of file processing of estate planning files which include file management, reminders, communications with clients including forwarding draft documents, responding to client inquiries, making routine changes to documents, following-up on drafts, billing file and reporting to the client. Work is completed in timely fashion with little direction, according to general procedures.
- Document preparation: Take instructions from lawyer and draft wills, powers of attorney and other related estate planning documents. Maintain good knowledge and understanding of department precedents. Ensures files are complete and documents are ready for signing.
- Coordinate with internal departments for support in other areas of law to assist the client in completing a corporate or real estate transactions
- Review wills at reporting stage to identify potential issues and bring them to the attention of the lawyer
- Complete Insurance Forms and correspond with Insurance Companies on behalf of the client.
- Communicate with Trust Companies with respect to the client's Will and Power of Attorney and complete their relevant forms and agreements for client's signature.

- Family Trust: Prepare Trust, Acknowledgements, Promissory Notes, Resolutions, and a Minute Book. Review signed documents and prepare reporting letters for family trust files.
- Commission Affidavits of Execution.
- Act as witness including out of office appointments, as required.
- Send follow up letter or make follow-up calls when wills are not signed.
- Up-to-date knowledge of requirements and expectation of third parties to estate planning (i.e. trust companies, insurers).

Use of Technology:

Proficient in using software related to specific functions, including Windows, Word, Emergent, Outlook, Internet, ProLaw.

Education

- Completion of a Legal Secretarial program and completion of a Law Clerk designation.

If you are interested in the opportunity to join a successful, dynamic and growing organization, please forward your email to:

Attention:

GerryHolmes

Office/Human Resources Manager

gholmes@pallettvalo.com

We thank all applicants for their interest. Due to the high volume of applicants we receive, we are unable to respond to queries individually and only those selected for an interview will be contacted.

No agencies please.

Pallett Valo is committed to creating an inclusive and welcoming workplace for all individuals. Should you require any accommodation during the application, interview or onboarding processes, please contact Human Resources. Pallett Valo LLP will consult with the person making the request in determining the best accommodation, accessible format or communication support that can be provided.

We believe in equal opportunity and we are committed to meeting the needs of all individuals including individuals with disabilities, by preventing and removing barriers to accessibility and meeting accessibility requirements under the Accessibility for Ontarians with Disabilities Act.

Pallett Valo LLP is the largest and one of the most respected law firms in Peel Region. We are a full service law firm providing businesses with legal services in Business Law, Commercial Litigation, Commercial Real Estate, Construction, Insolvency & Corporate Restructuring, Employment & Labour and Wills, Estates & Trusts.

The strength and talent of our people allow us to provide outstanding service to our clients. At Pallett Valo establishing a solid relationship built on trust with our employees, customers and the community is at the forefront. Our values of Excellence, Integrity and Respect are woven into the fabric of who we want to be as an organization to our employees and in how we service our clients.