

February 27, 2026

**JOB DESCRIPTION:**

## **ASSISTANT OFFICE MANAGER**

**POSITION SUMMARY:**

At Kerlin Walsh Law, we are seeking a proactive and detail-oriented Assistant Office Manager to support daily office operations and ensure a seamless client experience. This role plays a key part in maintaining workflow efficiency, managing scheduling and billing processes, supporting attorneys and staff across all practice areas—including Estate Planning, Probate, Trust Administration, and Real Estate—and serving as a key point of communication between the firm, clients, and professional partners.

**EDUCATION AND EXPERIENCE:**

A high school diploma is required; an associate's or bachelor's degree in business administration or a related field is preferred. Prior administrative or office management experience is desired.

**KEY RESPONSIBILITIES:**

- **Managing** ongoing email communication with clients regarding drafts, document updates, and requested information
- **Corresponding** with financial advisors and other professional partners to facilitate coordination and information exchange
- **Following up with** clients and financial advisors to ensure timely responses and proper alignment of planning details
- **Assisting attorneys** by gathering and transmitting documentation necessary for estate planning and trust administration matters
- **Serving as a responsive point of contact** to ensure a smooth and professional client experience

**OFFICE & CALENDAR MANAGEMENT**

- **Greeting clients** as they arrive for appointments
- **Managing the office calendar**, including scheduling appointments within workflow software
- **Confirming** next-day appointments and scheduling/sending Zoom invitations

**Benefits**

- Competitive Base Salary commensurate with experience
- 401(K)
- Paid Time Off (PTO)
- Shared-Cost Health Care Coverage

**Knowledge:**

- Understanding of administrative and office procedures and systems
- Familiarity with legal workflow software (Clio Grow and Clio Manage preferred)
- Foundational knowledge of Estate Planning, Probate, Trust Administration, and Real Estate practice areas
- Fluent in English language

**Skills:**

- Strong organizational and time-management skills
- Excellent written and verbal communication skills
- Professional email communication and correspondence abilities
- Proficient in MS Office and adaptable to firm software systems
- Ability to multitask and prioritize daily workload
- High level of discretion and confidentiality

*Continued on next page*

**PLEASE SUBMIT YOUR COVER LETTER AND RESUME TO:** Kathryn Rachuy, lawoffice@kerlinwalshlaw.com

JOB DESCRIPTION:

## ASSISTANT OFFICE MANAGER *continued*

### OFFICE & CALENDAR MANAGEMENT *continued*

- **Converting** clients from Clio Grow to Clio Manage
- **Ensuring** client matters are properly established in Clio Manage

### CALL & CLIENT FOLLOW-UP COORDINATION

- **Assisting attorneys** during appointment wrap-up to ensure smooth client transitions
- **Taking and logging all calls**
  - | Making follow-up calls to ensure clients remain on the calendar
  - | Following up with prospective clients after events
  - | Returning missed calls

### BILLING & FILE MANAGEMENT

- **Billing clients**, tracking payments, and ensuring each file has a prepared invoice
- **Preparing files** for the following day
- **Printing** prior estate plans for follow-up appointments
- **Filing Wills** in local counties
- **Pulling deeds** as needed and completing deed runs for exempt stamps
- **Completing data** entry projects and organizing digital files for remote accessibility
- **Ensuring** timely shipment of client documents

### PRESENTATION & EVENT SUPPORT

- **Attending internal and external presentations** and firm events to provide logistical and client support
- **Coordinating and confirming** guests for *Where the Road Rises*
- **Preparing marketing** materials and presentation materials for events

### OFFICE OPERATIONS & ADMINISTRATIVE SUPPORT

- **Maintaining** a strong foundational knowledge of each firm practice area
- **Maintaining** office cleanliness and organization, including conference room upkeep and daily walkthroughs
- **Sending thank-you** and condolence cards as appropriate
- **Preparing** and approving binders and scans for Estate Planning clients
- **Covering** for the Office Manager during periods of absence
- **Ensuring** timely shipment of client documents

### Abilities:

- Able to follow procedures for compliance purposes
- Oral and written expression and comprehension with proper syntax and grammar
- Create and manage interpersonal relationships

### Other Characteristics:

- Detail-oriented
- Proactive
- Able to work independently as well as part of a team
- Willingness to learn

**PLEASE SUBMIT YOUR  
COVER LETTER AND  
RESUME TO:**

Kathryn Rachuy  
lawoffice@kerlinwalshlaw.com