

May 18, 2026

JOB DESCRIPTION:

**LEGAL ASSISTANT** (FULL TIME – Estate Planning Focus)

**POSITION SUMMARY:**

At Kerlin Walsh Law, we are looking for a proactive Legal Assistant to support our estate planning team with client intake, document preparation, and case management. You'll use strong organizational, writing, and communication skills to keep our work flow running smoothly and assist attorneys with drafting and file maintenance. Familiarity with finance and a keen eye for detail are key

**KEY RESPONSIBILITIES:**

- **Recording deeds** that come through the office, including having familiarity with each municipality's requirements
  - Managing out of state deeds through communication with outside attorneys
  - Ensuring recorded deeds get married to correct file once returned
  - Mailing and scanning deeds to clients when relevant
  - Ensuring correct billing of deeds
- **Taking and logging calls** and resolving matters
- **Drafting Estate Plans** - including simple plans, minor changes and redates
- **Drafting Funding Letters** to make recommendations to clients on aligning assets with trust
- **Verifying client information** on as-needed basis
- **Preparing for and attending Estate Planning Meetings twice per week**
  - Making live-time digital updates of tasks assigned in such meetings
  - Ensuring you have fully prepared files for prompt meeting start

**Knowledge:**

- Understands administrative and office procedures and systems
- Fluent in English language
- Legal knowledge of estate planning and real estate a plus but not required
- A strong working knowledge of finance is desired

**Skills:**

- Strong organizational and planning skills
- Excellent written and verbal communication skills
- Proficient in MS Office and familiar with legal management software and ability to adapt to working within the legal software used by KWL
- Ability to multitask and prioritize daily workload
- High level of discretion and confidentiality

**Abilities:**

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

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**PLEASE SUBMIT YOUR COVER LETTER AND RESUME TO:** Haley Galvin, [practicemanager@kerlinwalshlaw.com](mailto:practicemanager@kerlinwalshlaw.com)

— Attorneys —  
EILEEN KERLIN WALSH  
JOELLE DOYLE  
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— Attorneys —  
JACQUELINE RIOTTO-NICK  
GINA MAYER

JOB DESCRIPTION:

## LEGAL ASSISTANT (FULL TIME – Estate Planning Focus) *continued*

### KEY RESPONSIBILITIES: *continued*

- Preparing spreadsheets/Clio reports and making sure they are accurate and up-to-date
- Ensuring files are properly put away following meetings, and brought to relevant co-workers when applicable
- **Able to take client meetings** for doc signing, funding appointments, and 6 week check-in calls, as needed
- **Understanding and being able to cover tasks for the Practice Manager** on an as-needed basis, including preparing files and materials for upcoming appointments, managing and updating client information within the firm's software system, coordinating schedules and communication between staff and lead attorneys, as well as some client communications, and helping ensure deadlines and follow-up tasks are completed on time
- **Understanding how to establish LLC's when needed**
- **Able to draft Assignments of Business Interest**
- **Assisting in other practice areas, including Real Estate, Trust Administration and Probate, as assigned**

### QUALIFICATIONS:

- **Education:** A high school diploma is required; an associate's or bachelor's degree in business administration, finance, English, or a related field is preferred
- **Experience:** 2-3 years of experience working in a fast-paced law firm preferred. Previous experience as a Legal Assistant desired

### Other Characteristics:

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

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