

Trust Administrator - Culp Elliott & Carpenter, PLLC  
Charlotte, NC

Culp Elliott & Carpenter is an established trusts and estates boutique law firm in the SouthPark area of Charlotte, NC. We are growing our team and searching for a professional who is seeking a career in estate and trust administration and paralegal type work. No experience in the field is required; we will provide on the job training. This position will learn from and support our seasoned team of professionals who provide trust and estate administration, estate planning, and client relationship management.

This position offers a clear path for professional and salary advancement, along with training and education to obtain paralegal certification.

We are seeking a candidate who is good with numbers, precise with details, and interested in trust and estate administration. Specific paralegal experience nor a certificate are required, yet skills/training in areas such as trust administration, bookkeeping/accounting, editing, proofing, and researching are highly desirable. Strong MS Word, Excel and Power Point skills are required.

DUTIES AND RESPONSIBILITIES

- Work collaboratively to support a team of attorneys, accountants, trust administrators and paralegals to implement and administer complex structures involving trusts and estates
- Under the direction of an attorney and/or a senior paralegal prepare and review trust resolutions and annual accountings
- Learn to interview clients, gather facts, save, and retrieve matter information
- Learn to prepare and reconcile detailed accounting records

REQUIRED QUALIFICATIONS:

- Four-year college degree
- Ability to work independently and efficiently once skill is mastered
- Meticulous attention to detail
- Ability to work collaboratively with team of professionals including attorneys and paralegals
- Strong interpersonal communication skills
- Highly trustworthy and careful with confidential and sensitive information
- Strong MS Word, Excel and Power Point skills

PREFERRED QUALIFICATIONS:

- Knowledge of trust and estate administration
- Knowledge of gift tax preparation
- Bookkeeping / accounting experience
- Family office experience

We offer a competitive compensation and benefits package.