



**Job Title:** Estate Planning Paralegal

**Location:** 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 an experienced professional who is seeking a career in estate and trust administration and paralegal work. Prior trusts and estates legal experience is required. 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 may be full-time, reduced hours or part-time. The position offers a clear path for professional and salary advancement, along with training and education.

We are seeking a candidate who is good with numbers, precise with details, and interested in trust and estate administration. Skills and 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:**

1. Work collaboratively to support a team of attorneys, accountants, trust administrators and paralegals to implement and administer complex structures involving trusts and estates
2. Under the direction of an attorney and/or a senior paralegal prepare and review trust resolutions and annual accountings, estate tax returns, gift tax returns
3. Interview clients, gather facts, save, and retrieve matter information
4. Prepare and reconcile detailed accounting records

**Qualifications:**

- Minimum two to three years of experience in Estate Planning
- Knowledge of trust and estate administration
- Ability to work independently and efficiently once skill is mastered
- Meticulous attention to detail
- Ability to work collaboratively with teams 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:**

- Four-year college degree
- Knowledge of gift tax preparation
- Bookkeeping / accounting experience
- Family office experience

We offer a competitive compensation and benefits package.