ClearPoint
Federal Bank & Trust

Fiduciary Paralegal

Job Brief

At ClearPoint Federal Bank & Trust ("ClearPoint" or the "Bank"), you are given the opportunity to do meaningful work aligned with your strengths, in an environment where you have a voice, are encouraged to collaborate with others, and have the choice to create your career path. This position will be responsible for supporting the Fiduciary Legal Specialist with legal and compliance research, monitoring, communication, and execution of related work. This person must be detail oriented, highly organized, and must possess flexible skills to deal with the various nuances of trust accounts and trust compliance, including the ability to anticipate issues. To be successful, strong customer service skills and attention to detail are required to ensure accuracy and quality outputs to facilitate better decision making and assist in meeting company and department goals. Based in our Batesville, Indiana office, you will work closely with members of the ClearPoint team.

RESPONSIBILITIES:

- Responsible for trust compliance and legal research, reporting to Fiduciary Legal Specialist on legal changes, compliance questions, and state-specific requirements in laws or regulations.
- Responsible for basic research in Westlaw/Capital Watch.
- Communicate and maintain a good rapport with peers outside the company to help common clients, obtain new business, and be on the forefront of legislative changes.
- Provide daily support for customers as requests are made.
- Provide research and analytical support for the Fiduciary Legal Specialist as needed.
- Assist with form contract change process.
- Assist Fiduciary Legal Specialist with the unclaimed property process.
- Communicate with individuals at all levels, including clients and their investment advisors, auditors, tax preparers, and consultants.
- Provide customer service support by monitoring phones and responding to customer and contract-holder inquiries or routing issues throughout the organization as needed.
- Willingness to grow and take on additional responsibilities as warranted and learn all aspects of industry compliance and regulation.
- Additional responsibilities as required.

REQUIRED SKILLS

Effective Communication Skills to be deployed in a variety of communication settings including both written and oral in one-on-one and group settings, being mindful of diverse styles and position levels. Adjusts style to fit the audience and message. Skilled in concise messages.

Problem-solving Skills to identify problems and find solutions, readily acts on challenges; displays a can-do attitude and collaborative approach.

Teamwork Skills to work well with colleagues, management, and clients to make the work environment efficient and enjoyable.

Customer Service Skills to advocate on behalf of clients to more senior management, identifying approaches that meet clients' needs as well as those of the organization; evaluates emerging opportunities to meet clients' needs.

REQUIREMENTS:

- Must possess a paralegal certificate or comparable work experience, with Westlaw or Nexis research knowledge/experience.
- One to three years' experience in a trust department, estate planning firm, or related experience is a plus, but not required.
- Demonstrated problem-solving, decision-making, and communication skills, both written and oral.
- Ability to work independently.
- Continuous improvement mindset.
- Must take initiative to address issues proactively.
- Proficient with technology including MS Outlook, Excel, and Word.
- Ability to coordinate and complete multiple tasks in a timely and efficient manner.
- Knowledge of preneed funeral and cemetery trusts is a plus, but not a requirement.