ClearPoint
Federal Bank & Trust

**Fiduciary Paralegal**

**Job Brief**

At ClearPoint, 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 Manager with legal and compliance research, monitoring, communication, and execution. Will serve as the initial point of contact for internal staff related to legal questions/issues, with review by Fiduciary Legal Manager. 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. Leadership skills to engage employees and advance services to electronic platforms is appreciated. This position offers a hybrid schedule model with our office in Batesville, Indiana, you will work closely with members of the ClearPoint team.

**RESPONSIBILITIES:**

Responsible for trust compliance and legal research, reporting to Fiduciary Legal Manager 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 in order to help common clients, obtain new business, and be on the forefront of legislative changes.

This position is responsible for the daily monitoring of industry and legislative changes.

Provide daily support for key customers as requests are made.

Provide research and analytical support for the Fiduciary Legal Manager as needed.

Revise and track contract form changes, obtaining state approvals where necessary.

Communicate with individuals at all levels, including clients and their investment advisors, auditors, tax preparers and consultants.

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; written and spoken, one-on-one, group settings; diverse styles and position levels.  Adjusts style to fit the audience and message, skilled in concise messages.

**Leadership Skills** to motivate and direct the team to complete tasks and achieve goals, at the team and individual level; manage challenges; supports legal strategic plans and learning opportunities.

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

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**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 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.