

## **JOB DESCRIPTION**

### **ESTATE PLANNING ADMINISTRATIVE ASSISTANT**

**REPORTS TO:** Director of Planned Giving Services and Estate Planning Attorneys

**BASED AT:** Barnabas Foundation, Crete, IL

**PURPOSE:** The Administrative Assistant's primary responsibility is to assist the Estate Planning Attorneys of the Planned Giving Services and the Estate Planning department with organizing, scheduling, and various other operating needs.

### **KEY RESPONSIBILITIES**

1. Perform secretarial and clerical duties for the Estate Planning Attorneys of the Planned Giving Department.
2. Arrange and schedule appointments with clients or planning staff.
3. Complete necessary follow-up work after appointments, including typing up correspondence and analyses.
4. Compose correspondence; report information in person or by telephone where judgment, knowledge, and interpretation of policies may be necessary.
5. Compile documents as needed for donor funds, life income agreements or for estate workshops and seminars.
6. Prepare initial paperwork, donor correspondence and compliance documentation during the real estate gift process.
7. Calculate, update and maintain proper information in the client database software system.
8. Arrange for bulletin announcements for Estate Planning staff when they travel.
9. Support Estate Planning staff by retrieving file information, forwarding electronic or mailed correspondence and performing data entry for planners.
10. Correspond with organizations regarding probable estate distributions via Barnabas Foundation.
11. Backup receptionist with inbound call coverage one day per week.

## QUALIFICATIONS

The qualifications of the successful candidate for this position include:

1. A passion for helping Christians recognize God's ownership of everything and the importance of handling what is entrusted to them in a manner that honors God.
2. A business degree or an associate's degree is preferred, but a high school graduate with equivalent work and skill experience may also be acceptable.
3. At least 3-5 years experience in an administrative related position.
4. Experience working with a law firm or attorneys is helpful, but not required.
5. Excellent keyboarding and computer skills mandatory given that 75% of the job requires the use of a computer.
6. Proficient knowledge of Word, Excel, Outlook, and PowerPoint.
7. Familiarity with a Contact Management database program.
8. Excellent writing ability and verbal communication skills.
9. Exceptional attention to detail and accuracy.
10. Ability to multi-task in an organized manner.
11. Ability to keep client and organizational matters confidential.