Title:	Paralegal
Classification:	Full-time; Onsite, Hybrid Available
Department:	Legal
Reports to:	Associate General Counsel

Objective: Keep our Legal Consultants organized, supported, and informed while providing excellent service and communication to our clients.

FP Transitions Introduction: At FP Transitions, our team helps wealth advisory firms identify, build, and realize value. We value innovation, collaboration, client-centricity, and objectivity. We are entrusted with mission-critical moments and drive life-altering business decisions.

Role Summary: The Paralegal team is a central hub for client engagements with our legal team. They keep our consultants organized and supported, so they can focus on the client in front of them; they keep our clients informed about their ongoing status to keep them engaged and on track. This vital support person will project manage and maintain data in Salesforce, Smartsheet, SharePoint, and other tech platforms as adopted by leadership. This person handles sensitive business information confidentially and communicates with clients in a timely and effective manner.

Essential Functions:

Your responsibilities will include, but may not be limited to:

- Coordinate workflow and communication for the Legal consulting team, including scheduling calls with multiple clients/consultants while observing multiple time zones and responding appropriately to client emails in a timely manner.
- Set up client records and ensure all necessary information and documents are gathered appropriately, researching the client in various public and regulatory databases as needed.
- Participate in client onboarding calls and set appropriate expectations for the consulting process; review progress with client as needed.
- Maintain templates, updating formatting, content, and dates as needed and directed by leadership.
- Participate in the preparation of legal documents for clients, demonstrating strong attention to detail.

- Task and Project Management: Effectively manage your projects, ensuring milestones are met, and deliverables are produced with exceptional quality.
- Database Management: Maintaining accurate records of client interactions, project status, and relevant data as required by company standards.
- Issue Resolution: Identify and address potential issues or roadblocks that may arise during the client's journey, working proactively to find solutions.

Knowledge, skills, and abilities:

To thrive in this role, the ideal candidate should possess the following qualifications:

- Exceptional communication and writing skills, maintaining strict confidentiality when appropriate
- Microsoft Word: Proficient or greater knowledge of Microsoft Word and the rest of the Microsoft Office Suite (Excel, PowerPoint, Outlook, Teams, and SharePoint)
- Familiarity with Salesforce CRM and Smartsheet or a similar relational database is preferred
- Research and reporting skills
- Project management experience preferred
- Strong attention to detail
- Organization: Demonstrated ability to manage multiple tasks, prioritize responsibilities, and maintain meticulous attention to detail

Education and Experience:

- Experience in a related field or position is strongly preferable (e.g., legal support, paralegal, legal assistant)
- A degree (Associate or higher) or certificate in paralegal studies is preferred
- Experience in the wealth management/financial services industry is strongly preferred.
- Proven experience in project coordination or management, with a track record of successfully delivering projects on time and within scope.

Compensation and Benefits

- Salary $20.00-$28.00 per hour DOE
- Medical, Vision, Dental, 401k with 25% employer match.
- Company lunches, snacks, and team-building events.
- Company holidays (including employee’s birthday) and accrued PTO.

Physical factors & working conditions:

- Full-time exempt; office environment, hybrid remote possible with manager's approval; minimal travel required.