Estate Planning Funding/Asset Integration Coordinator (Full Time)

One of metro-Boston’s premier estate planning firms seeks asset integration coordinator to update and maintain estate planning client asset spreadsheets; specifically, track ownership, beneficiary designations and asset values. Ideal candidate is looking for an opportunity to learn and grow personally and professionally. This is a great opportunity for anyone interested in the field of law, but no legal experience is required. We are looking for someone who is eager to learn our unique process from the ground up.

Applicants must:

- Be a self-starter who is able to complete tasks following initial training period
- Have excellent follow-through skills in order to meet deadlines
- Be very detail-oriented, organized and dependable
- Have a strong sense of care and compassion for others
- Be professional in actions, speech and dress
- Be dedicated to firm and team success
- Be a team player and contribute to friendly, upbeat work environment
- Be able to bring positive energy to the team
- Possess a commitment to quality and work ethic
- Be proficient in Microsoft Excel and have excellent computer skills
- Be confident in working with numbers

Knowledge of FundingPro and TimeMatters is a plus, but not required.

All resumes accepted in strict confidence. Excellent opportunity for growth and development. College graduate preferred. Position is full time. References required. Please email your resume to megan@feplg.com. No phone calls, please.