

KAUFMAN & CANOLES

attorneys at law



The Kaufman & Canoles Williamsburg office is seeking a qualified **Trust & Estate Administrator** to oversee complex trust and estate administration and prepare related tax returns.

RESPONSIBILITIES:

1. Manage trust and estate probate administration, drafting correspondence and legal documents, prepare deeds, asset spreadsheets, probate pleadings, and review of bank statements, accountings and/or financial statements.
2. Interact with various banks and brokerage firms via telephone, email, and in-person.
3. Prepare complex estate, gift, and fiduciary income tax returns.
4. Research federal, state, and local tax laws related to client tax preparation.
5. Review estate documents for state/federal filing requirements and document provisions.
6. Provide support to various attorneys and tax preparers in department.
7. Maintain detailed and accurate daily billable hour records.

QUALIFICATIONS:

1. Bachelor's Degree in Accounting or related field preferred.
2. Four or more years' work experience in legal, finance or accounting. Tax preparation or trust and estate related work highly desirable.
3. CPA license, CFTA, or other related certifications preferred.
4. Proficiency in Microsoft Office with working knowledge of Excel. Experience in accounting programs and CCH ProSystem is beneficial.
5. Demonstrated exceptional mathematical aptitude and able to solve complex problems to develop a beneficial tax strategy for clients.

6. Ability to work both independently and within a team environment.
7. Proven organizational skills with ability to plan proactively.
8. Meticulous attention to detail and the ability to prepare a work product accurately, on-time, and in a cost-effective manner.
9. Ability to multi-task, prioritize competing responsibilities, and meet deadlines.
10. Ability to establish and maintain effective working relationships with clients, attorneys, co-workers, and other outside professionals.
11. Excellent oral and written communication skills.
12. Must be a self-starter and have a strong work ethic.
13. Flexible in working additional hours during tax season.

BENEFITS:

We offer competitive salary and a comprehensive benefit package. Benefits include medical, dental, vision, life insurance, 401(k)/profit sharing, paid time off, long term and short-term disability.