



Guardianship Paralegal

Program: Guardianship

Reports to: Staff Attorney

Job Location: Rutherford Office

Position Status: ☒ Full-time ☐ Part-time

FLSA Classification: ☒ Exempt ☐ Non-exempt

Salary Range: \$60,000 Annually

Assist Staff Attorney, Estates Team, and Program Director with legal work for guardianship clients for whom Family Eldercare, Inc. serves as court-appointed guardian and trustee.

Essential Responsibilities:

FILINGS AND PLEADINGS

- Prepare and e-file guardianship pleadings, applications, and related documents through eFileTexas as needed; correct and refile rejected pleadings. Filing to occur primarily in Travis and Williamson Counties, with occasional filings in other Texas counties as needed. Once accepted, download or otherwise obtain copies of all accepted, filestamped pleadings and save them to SharePoint.
- Monitor status of pending court orders and follow up with relevant court staff or clerks on orders as needed.

COURT APPEARANCES AND TRAVEL

- Travel to courthouses and clerks' offices as needed to deliver and pick up paperwork, and carry out other legal tasks.
- Attend court hearings with attorney as needed.

BONDS AND LETTERS OF GUARDIANSHIP

- Coordinate obtaining bonds for new guardianship appointments, maintaining annual bond renewals, and closing bonds upon the closure of guardianship cases. Includes correspondence with bonding agency, processing and saving bond paperwork and premium invoices, and forwarding premium invoices to relevant parties for payment.
- Maintain letters of guardianship by keeping track of their expiration dates, requesting and obtaining new letters of guardianship annually prior to their expiration dates, filing the paper originals, and saving and updating electronic copies in SharePoint and Bonterra Apricot database.

ANNUAL REPORTING, DRAFTING, AND DEADLINES

- Manage guardianship annual report submissions at a volume of 25 to 35 filings per month, working toward handling them independently after an initial training period. Send the list of upcoming annual reports to guardianship staff monthly, coordinate with staff to compile required documentation, review reports and provide revision feedback, and file the reports with the court.
- Draft routine and templated documents, such as applications for guardian compensation, applications to pay client expenses, applications for attorneys' fees, creditor notices, notifications of guardianship, and correspondence to court staff and third parties, for attorney review. Develop initial drafts of additional pleadings, such as inventories, monthly allowance applications, and applications for sale of property, for attorney review.

- Compile and organize backup documentation for annual and final accountings, including bank statements, receipts, invoices, proof of income and expenses, etc. Monthly volume of annual accountings ranges from 4 to 10 of varying complexity. Proactively obtain missing documentation from relevant parties, including internal staff, vendors, banks, and other third parties to meet county-specific court auditor requirements.
- Remain aware of and responsive to statutory deadlines (annual reports, annual accountings, expiration dates for letters of guardianship), track deadlines in Bonterra Apricot database, and prioritize work accordingly.

RECORDKEEPING, BILLING, AND COMMUNICATION

- Record time spent on tasks in six-minute increments and track time and client expenses in TimeSolv billing software to support regular attorney fee billing.
- Accurately and promptly maintain the legal calendar with hearings, case-related meetings and appointments, and other scheduled estate administration tasks, inviting all relevant parties to calendared events.
- Save and maintain all electronic legal and client files in SharePoint according to established file management and naming conventions.
- Enter, update, and maintain data in Bonterra Apricot to ensure accurate deadline reporting for annual reports, annual accountings, letters of guardianship, and other legal aspects of guardianship.
- Communicate professionally in person, on the phone, via email, and via fax with third parties, including court staff, court clerks, attorneys, banks/financial institutions, CPAs, medical providers, client family/friends, utility providers, HOAs, government offices, and other service providers as necessary to carry out legal and estate administration tasks.
- Notarize and witness documents as needed.

FIELD SUPPORT

- Occasionally (approximately once per month on average, when dedicated staff are unavailable or a project's scope requires additional help) assist guardianship staff with estate administration tasks in the field, including inventorying, securing, and moving client property, conducting estate sales, and delivering guardianship paperwork to third parties. Field tasks may involve lifting and carrying up to 20 pounds.

OTHER

- Perform other tasks as assigned to assist with administration of guardianship cases.

Competencies:

- Ability to learn and demonstrate knowledge of Texas guardianship law, the Texas Estates Code, and the Texas court system.
- Knowledge of or ability to learn contemporaneous time keeping and client billing systems.
- Ability to develop professional and productive relationships with supervisors, coworkers, clients, and third parties.
- Ability to interact and communicate in a professional, effective manner in person, on the phone, and in correspondence, and articulate clearly in verbal and written communication.
- Ability to problem solve, work both independently and collaboratively, take initiative, prioritize work, and receive constructive, professional feedback.
- Ability to work in an office setting, maintain accurate and organized files, perform accurate data entry, and maintain attention to detail.

Education and Experience:

- Bachelor's degree is preferred or equivalent combination of education and experience.
- Minimum of two (2) years of paralegal or legal assistant experience required; paralegal certification and a focus on guardianship and/or probate law preferred.
- Experience drafting basic court pleadings and legal correspondence, and e-filing pleadings with courts.
- Experience with time keeping for attorney fee billing and time-keeping software, such as TimeSolv.
- Notary Public for the State of Texas or ability to obtain within 90 days of hire.
- Knowledge of government benefit programs, including Medicare, Medicaid, Social Security and the representative payee program, Veterans Administration, etc.
- Strong organizational, writing, and communication skills; ability to manage workload, prioritize work, and respond to deadlines in a timely manner.
- Ability to produce quality work product, take initiative on tasks, and work independently with minimal supervision after training.
- Proficient in Microsoft Office software, including Teams, SharePoint, OneDrive, and Outlook.
- Must have reliable transportation, valid Texas Drivers License, and unexpired auto insurance.
- Must pass multi-state criminal background and motor vehicle driving record checks.

Work Environment:

- Ability to work in an office setting while using a computer and telephone for a significant period of time.
- Ability to travel occasionally to courthouses and clerks' offices, mainly in Travis County and Williamson County.
- Ability to assist with fieldwork as needed.
- Ability to safely and successfully perform the essential job functions consistent with the ADA, FMLA, and other federal, state, and local standards, including meeting qualitative and/or quantitative productivity standards.
- Ability to maintain regular, punctual attendance and work schedule consistent with the ADA, FMLA, and other federal, state, and local standards.
- Must be able to lift and carry up to 20 pounds.

Acknowledgement and Review:

By signing this job description, I acknowledge that I meet the qualifications and am able to perform all job functions, duties, and responsibilities. I further understand that I am responsible for promptly and effectively communicating in writing to Family Eldercare, Inc. any need for accommodation. I acknowledge that I have read, understood, and received a copy of this job description. I further understand that Family Eldercare, Inc. reserves the right to modify any company policies, procedures, and processes based on organizational needs.

Print Employee Name:**Employee's Signature:****Date:**