

## Job Description

### ESTATE PLANNING ADMINISTRATIVE ASSISTANT

<b>REPORTS TO:</b>	Director of Client Services
<b>BASED AT:</b>	Barnabas Foundation, Crete, IL
<b>SCHEDULE:</b>	Full-time, 40 hours a week with hours between 7:00 a.m. and 7:00 p.m. Central Standard Time (hours to be determined)
<b>PURPOSE:</b>	Provide administrative and client-facing coordination for estate planning professionals by scheduling client interactions, maintaining accurate records, and ensuring timely professional communication from initial contact through follow-up.

### KEY RESPONSIBILITIES

- Schedule client appointments and coordinate meeting logistics between clients and planners.
- Maintain planners' calendars, track deadlines, and send reminders to support on-time completion of deliverables.
- Respond to client inquiries via email and telephone and route to the appropriate planner.
- Prepare client correspondence and coordinate gift arrangements at the direction of the planner.
- Document client interactions and update records promptly and accurately in the Client Relationship Management (CRM) system.
- Coordinate communications with member organizations regarding their donors, as needed, to support planner follow-up.
- Arrange planner travel, including reservations and itineraries, as requested.
- Performs other related duties as assigned.

## QUALIFICATIONS

The qualifications of the successful candidate for this position include:

1. Total commitment to Jesus Christ as your Lord and Savior and a desire to live with Him for eternity.
2. Commitment to keeping client and organizational matters confidential.
3. Exceptional attention to detail and accuracy.
4. Excellent written and verbal communication skills, including professional email and phone etiquette.
5. Proficiency with Microsoft Office (Word, Outlook, PowerPoint) and comfort learning and using CRM and other business software.
6. Ability to manage multiple priorities, meet deadlines, and follow established processes with minimal supervision.
7. Strong customer service mindset and ability to interact respectfully with clients and member organizations.
8. Ability to coordinate effectively with planners and internal teams to ensure timely follow-through.
9. Experience working with a law firm, attorneys, or estate planning professionals is helpful but not required.
10. Paralegal certificate, associate degree, or bachelor's degree (paralegal studies preferred) or equivalent relevant experience.

### **Pay rate**

This is an hourly position with a budgeted pay rate of \$22-\$25 per hour.

**Interested individuals should send their cover letter and resumé to: [jobs@BarnabasFoundation.org](mailto:jobs@BarnabasFoundation.org)**