

**JOB DESCRIPTION**

**Job Title:** Legal Secretary

**Date:** February 3, 2017

**FLSA Status:** Non-Exempt

**Position Status:** Part Time

**Direct Manager:**  Director of Operations – Vivianna Diaz

**Conformance Statement:**

In the performance of your responsibilities and duties you are expected to conform to the following:

* Take *PRIDE* in job duties and responsibilities while making a positive contribution to our firm by adhering to Synergy’s Corporate Values – Professionalism, Respect, Integrity, Dedication and Empathy.
* Perform quality work within deadlines with or without supervision.
* Interact professionally with other employees and clients.
* Provide world class customer service to clients and vendors.
* Work effectively as a team contributor on all assignments.
* Work independently while understanding the necessity for communicating work efforts with other employees and others deemed necessary.
* Maintain and strengthen client relationships.

**Non-Negotiables:**

It is imperative the employee in this position have a vast and current working knowledge of the software sustaining their business unit. It is the responsibility of all employees to utilize the CRM software selected by the Company to track daily activities. All employees must ensure this information is consistently maintained, is accurate and is kept current daily. All corporate data, including the Company’s CRM software must be maintained in the business unit’s software and may not be maintained or transferred outside of the business unit’s software or maintained or transferred to any personally owned devices.

The employee in this position shall not enter, or attempt to enter, any agreement with any person or entity that would bind employer, without the prior written consent of the Chief Executive Officer of the company and the manager of the related business unit. Employee shall not disclose any intellectual property or knowledge gained as the result of employment by this company unless instructed to disseminate such information in a written communication from the Chief Executive Officer.

**Primary Duties:**

The duties and responsibilities of this position include, but are not limited to those listed below. These duties and responsibilities may be modified at any time by Management. Modifications will be in writing and will be acknowledged by both parties.

* Provide comprehensive case management for active SSNPT cases by maintaining client files and documents
* Provide customer service by handling potential and existing phone calls and/or emails
* Assist Business Unit Manager with scheduling for potential and existing clients
* Initiate and manage intake workflow by completing and creating tasks, such as phone calls, emails, and/or reminders
* Coordinate new case intakes in the Settlement Solutions National Pooled Trust business unit including input into the client management software, working out of SSNPT trust creator and obtaining missing information to complete trust
* Serve as a liaison with strategic partners in the SSNPT unit
* Responsible for tracking advanced and final fees for the SSNPT unit
* Process incoming mail and facsimile transmissions by updating case management program
* Resolve administrative issues by coordinating preparation of reports, analyzing data, and identifying solutions
* Contribute to team effort by accomplishing related results as needed

**Supervisory Requirements:**

* None

**Core Competencies:**

* Knowledge of Job – Demonstrates knowledge and competency of present job and all required equipment to perform duties.
* Quantity of Work – Quantity of work turned out and promptness with which it is completed.
* Quality of Work - Ability and accuracy of work produced, meeting company standards, neatness, detail, and level of satisfaction with the finished product.
* Technical Competency - Demonstrates technical competence in regular, periodic & irregular job duties.
* Flexibility - Ability to move from one task to another without problems. Willingness to take on new tasks & procedures.
* Follow Through - Ability to follow a task through from beginning to end and wrap up the final details, without management intervention.

**Requirements:**

* Proficient with Microsoft Office Suite
* Professional attitude and demeanor
* Ability to sit for prolonged periods of time at a computer workstation while entering data and communicating with clients via email and telephone.

**Education and/or Experience:**

* High School Diploma or equivalent
* Three-year progressive experience

**Acknowledgment:**

**I reviewed and understand the above job description and I confirm that I am able to perform all of the job functions, duties and responsibilities described above with or without reasonable accommodation.  I acknowledge that the job description only lists the primary functions of the job and is not an all-inclusive list, as other functions, duties and responsibilities may be assigned as needed.  I understand that I must comply with all applicable laws, as well as the Company’s policies and procedures, including, but not limited to, those relating to safety, quality, attendance, punctuality, confidentiality, internet, social media and email communications.  I agree that management of the Company may change, alter or modify this job description in their sole discretion.  I further acknowledge that I am an at-will employee of the Company and both the Company and I may end my employment relationship at any time, without specified notice or reason, regardless of this job description, any policies, procedures, practices, employee handbooks or otherwise.**

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Marisol Perez Date