

Paralegal – Private Client & Tax, Connecticut

Job Description



Who We Are



Who we are

We are an international law firm with a focus on private capital at the intersection of personal, family and business.

Our ability to understand people makes us who we are. We work together to build deep and trusted relationships that deliver meaningful value to our clients. We do this with empathy, attention, and clarity. No jargon, no attitude. We know what matters.



We are committed to running our business responsibly

We recognize that our long-term success as a responsible business depends on the health and resilience of our people, our clients, our communities, and our natural environment. We are working hard to ensure that we make a positive contribution for all our stakeholders.

As part of this, we are committed to developing an increasingly diverse, inclusive, and supportive workplace environment where everyone can bring their whole selves to work, feel valued, feel that they belong and can fulfil their potential.



What we value

Our values represent who we are as a Firm. They are designed to guide the way we think, behave, speak, collaborate, and do business. Please see our four core values below.



Collaborative
we pull together



Committed
we drive performance



Authentic
we stay grounded



Forward-looking
we look beyond

Paralegal – Private Client & Tax, Connecticut

We are an international law firm focused on private capital at the intersection of personal, family and business. We advise individuals, families and entrepreneurs globally, combining technical expertise with a collaborative and relationship-driven approach.

As part of our continued US growth, we are developing our private client and tax capability in Connecticut and New York. This role offers the opportunity to join at an early stage in a growing international practice advising successful individuals, families, and businesses globally.

This opportunity is suited to a paralegal with 3+ years relevant paralegal experience, who can demonstrate strong skills and attention to detail, with an ability to prioritize across multiple projects and a broad range of private client and tax matters. Areas of focus include trust administration and entity administration support working directly with partners and clients.

Roles and Responsibilities

Assisting attorneys with trust administration including:

- Obtaining appraisals and other asset valuations, retitling assets, setting up bank accounts, obtaining taxpayer identification numbers
- Drafting distribution documents (including deeds, assignments, receipts and releases), drafting trustee resolutions, maintaining trust records, and coordinating annual tax returns
- Preparing formal and informal fiduciary accountings
- Providing concierge services to beneficiaries, coordinating information collection, distributions, and tax reporting, as well as being a key point of contact for families and intermediaries

Assisting attorneys with entity administration including:

- Preparing and file formation documents for corporations, LLCs, and partnerships
- Preparing organizational documents, minutes and resolutions
- Assisting with entity maintenance, governance and compliance matters

- Maintaining corporate records and ownership ledgers
- Assisting with entity restructuring and dissolution
- Performing other job-related duties as assigned (training on advanced trust administration including fiduciary accounting is available)

Skills and Experience

- Minimum three years' experience as a paralegal
- Proficient in MS Word, Excel, PowerPoint, and Outlook
- Bachelor's Degree required

Person Specification

- Excellent written and verbal communication skills, with the ability to present complex information in a clear and concise manner
- Strong organisational and practice management skills
- Able to work effectively under pressure whilst maintaining attention to detail

Contact

If you have any queries, please contact

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This job description is not rigid or exclusive and may be adjusted at any time in consultation with the Partners and/or Director of HR to meet the needs of the Firm or the post holder. There is constant review and adaptation to meet the changing needs of the Firm.

Please note in respect of our UK offices, any offer of employment will be conditional upon the successful candidate having the right to reside and work in the UK. In respect of the overseas offices any offer of employment will be subject to being able to obtain the relevant visa. Charles Russell Speechlys is committed to its effort to ensure there is no modern slavery or trafficking in their organisation or supply chain, details can be found on our Modern Slavery Statement. Charles Russell Speechlys is an equal opportunities employer. We respect and support diversity within our workforce.