



Gross Polowy LLC

Team Member Opening: Legal Assistant - Surrogates
Department: Probate/Service of Process
Reports to: Suzanne Palmer, Manager
Location: Williamsville, NY (hybrid after initial training)

About Gross Polowy:

As a two-time recipient of New York State's "Best & Brightest Companies to Work For", a seven-time winner of "Best Places to Work" and a two-time winner of "Healthiest Employers" by the Buffalo Business First journal, Gross Polowy prides itself on being a people-first, employer of choice. Established in 2011, our practice is focused in the financial services and real estate industry. Through multiple offices across our geographic footprint, our attorneys and legal professionals work as one team, at our best each day, toward the shared goal of "Achieving Greatness in All We Do." As a culture, we are consciously committed to the communities in which we live and work and provide support to a variety of local charitable organizations.

You'll Thrive Here If:

If you are a well-rounded, results driven, ambitious, and highly motivated individual who enjoys rolling up their sleeves to add value to shared goals, you'll thrive at GP. Our happiest and most successful team members are able to discuss complex ideas in concise terms, and translate action plans into targeted results. Our goal is to achieve greatness in all we do and that translates through our values of Personal Responsibility, Unparalleled Quality, Respect, Positive Environment, Leadership and Exceed Expectations. These six qualities are the core of our way of living and if that resonates with you, you will raise the bar on our team!

About the Role:

Completing review of Deceased Defendant Research/Due Diligence, Preparing Probate Applications and supporting documents, Submitting Probate Application to Court, Tracking of Surrogates applications, letters & decrees.

Work part of a team to ensure searches are completed accurately per client requirements, providing unparalleled quality in your work product.

Duties:

- Read firm's case management system for an understanding of each file.
- Request, collect and follow up on documents and/or evidence needed to move file along.
- Prepare Petition for client execution.
- Prepare Citation and Affirmation of Merit.
- Make corrections to packets as dictated by the attorney.
- Prepare the necessary cover letters to Court, filing of the petition and review specific county requirements and assemble the court submission in the proper order as required by Court.
- File Petition application with Court.
- Prepare appearance outline.
- Review and update file per appearance results.
- Work with service department for anything needed in regards to service of citation.



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- Prepare Letters and Decrees.
- Prepare and file any necessary supplemental documentation with Court.
- Handle Court Calls.
- Track all documents pending at court through pulling of reports and contacting Court to obtain status updates on signed and filed documents that are not received within the allowable timeframe.
- For files that need more information for the courts – request the necessary documents from the appropriate source and escalate to the attorney appropriately.
- Complete firm's case management system and update steps on all client systems.
- Approve Public Administrator Invoices as needed and request any checks for payment if applicable.
- Responsible for providing training and work guidance to others within the group.
- Assist in further escalation and follow up through review of the workitems, workbenches and reports.
- Additional duties as assigned and/or as business needs dictate.

Knowledge, Skills + Abilities:

- Experience within legal (probate) and/or banking, possible same field experience
- Able and willing to bring questions and/or concerns to direct trainer and/or Manager
- Proficient in most aspects of position
- Able to work independently
- Demonstrates positive behavior plus excellent communication to Manager, Attorneys of the firm, co-workers, other departments and clients
- Identifies potential issues and immediately brings to the attention of Manager

Compensation Range: \$19 - \$22/hour

*Base pay offered will vary by candidate and is based on various individual factors including but not limited to: market location, job-related knowledge, skills, and experience. The total compensation package for this position may also include other elements, including a full range of medical, financial, and/or other benefits (including 401(k) eligibility and various paid time off benefits). If offered, details of participation in these benefit plans will be provided if a candidate receives an offer of employment.