

---

**JOB TITLE:** TRUST PARALEGAL  
**DEPARTMENT:** TRUST & LEGAL  
**REPORTS TO:** VICE PRESIDENT & GENERAL COUNSEL  
**CLASSIFICATION:** NON-EXEMPT  
**LOCATION:** DALLAS, TEXAS

*The Trust Paralegal will be primarily responsible for administering estates benefiting charitable organizations in which HighGround Trust Company or the Estate Secretary or another officer of HighGround Advisors is named to serve as executor or administrator. The Trust Paralegal will be appointed to serve as the Estate Secretary and will coordinate the administration of each estate with the staff attorney assigned to handle the probate and other legal work related to the estate. The Trust Paralegal is also responsible for assisting the General Counsel and Associate General Counsels with document preparation and review, account research and review, and the oversight and coordination of various projects as assigned.*

#### WHO YOU ARE

As a part of the trust and legal team, your role as the Trust Paralegal requires strong analytical skills and an unwavering commitment to orchestrating multi-step processes. You utilize technology to increase efficiency and have a diverse skill set that enables you to prepare comprehensive reports and communicate professionally with internal and external team members. Your ability to work well in a team environment is commendable, but you also have the initiative to work independently. You understand the significance of attention to detail and strive to improve processes instead of merely completing assigned tasks. During busy times, you demonstrate effective prioritization skills, collaborate with your team, and complete all tasks with promptness and precision.

#### *Essential duties and responsibilities*

##### YOU ARE EXCELLENT AT:

- Maintaining a Will file with copies of documents and information pertaining to prospective estates to be administered by HighGround Advisors/HighGround Trust Company
- Coordinating funeral or memorial service planning and burial or cremation arrangements
- Gathering original documents and other information necessary to allow the probate attorney to prepare probate applications and other items needed in the probate proceeding and administration process
- Applying for tax identification numbers for estates and coordinating tax filings for estates and decedents
- Assisting probate attorney in the preparation of an inventory, appraisal and list of claims for each estate
- Collecting and securing assets of each estate and ensuring payment of debts and obligations of the estates
- Inspecting decedents' residences to secure personal property and other assets and conduct or arrange estate sales as needed
- Coordinating distribution of assets (including in-kind transfers or following liquidation) as directed in estate planning documents
- Assisting General Counsel and Associate General Counsels with document preparation and review as needed
- Overseeing administration of scholarships administered by HighGround Advisors
- Assisting General Counsel and Associate General Counsels with research and other projects as assigned
- Preparing reports, memos and/or emails to effectively communicate research findings and the status of ongoing projects

#### *Competencies and qualifications*

##### **YOU HAVE:**

- A paralegal certification preferred
- High school graduate, some college preferred
- 3-5 years of experience in estate administration or related areas of work
- Strong command of the English language
- Strong interpersonal, verbal and written communication skills required
- Strong analytical and evaluation skills
- Ability to handle numerous projects with equal importance
- Ability to work independently with minimal supervision

*HighGround has a professional, open office environment*

##### **TRUST PARALEGAL WORKING CONDITIONS:**

- Routinely uses standard office equipment such as computers, phones, multi-functional copiers and filing cabinets
- Usually sits to complete job functions, but may walk or stand, bend or stoop, for brief periods of time (access to sit-to-stand desks for optimal flexibility is provided)
- Must be able to lift up to 25 pounds
- Is required to have close vision, distance vision and the ability to adjust focus
- Is required to have the ability to lift files, open filing cabinets and bending or standing on a stool as necessary
- Is required to work onsite as scheduled with the potential to qualify to work from home two days a week and has some expected travel with occasional overnight assignments

The above statements are intended to describe the general nature and level of work being performed by the person(s) assigned to this job. They are not intended to be an exhaustive list of all duties, responsibilities and skills required of personnel so classified. Employees holding this position will be required to perform any other duties as requested by management, from time to time in its sole discretion. This updated job description supersedes prior descriptions for the same position. Management reserves the right to add or change duties at any time.

#### **WHO WE ARE**

*Our vision is to Protect, Strengthen and Grow our nonprofit clients.* We believe there is no pursuit more important than this; because we believe the work we do now and, in the future, will not only shape our lives but will empower the many organizations that truly transform lives. This vision forms an authentic pathway to our mission—to be an innovative and vigilant caretaker of the funds and assets entrusted to us by the nonprofits and generous individuals we serve through effective asset management, gift planning strategies and account support services. It is the outcome we work towards—to have a greater impact on the world and individual lives. We hope you will decide to join us on this incredible journey.

HighGround is committed to our brand promise and our core values. As such, we hope and expect that you will strive to keep our clients at the center of everything you do, be honest, remain professional at all times, exhibit humility and think outside of the box like our founders did, who were pioneering and visionary when our journey began in 1930.

HighGround offers a comprehensive benefits package that includes a medical plan, dental, vision, disability benefits, retirement plan and more but don't take our word for it, have a look at what other HighGrounders are saying and learn more about our benefits here:

<https://www.highgroundadvisors.org/careers>.

*If you are interested in becoming a part of the HighGround team please email your resume and cover letter to: [HR@highgroundadvisors.org](mailto:HR@highgroundadvisors.org).*