

Janet L. Brewer\* — Principal: [Janet@calprobate.com](mailto:Janet@calprobate.com)  
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## SENIOR PROBATE & TRUST ADMINISTRATION PARALEGAL / INTEGRATOR

Law Office of Janet L. Brewer | Los Altos, CA (Remote)

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### POSITION OVERVIEW

We are seeking an experienced Senior Paralegal to serve as the lead integrator for our probate and trust administration practice. This is not a traditional paralegal role—you will function as the operational backbone of our post-death administration work, managing workflows, coordinating team members, ensuring nothing falls through the cracks, and allowing our attorneys to focus on high-level legal strategy and client development.

This role requires someone who can hit the ground running with California probate and trust administration while also bringing strong project management skills to build systems, train staff, and keep 20+ concurrent matters moving forward efficiently.

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We need YOU to be the "backup point guard"—the person who ensures probate and trust administration matters progress smoothly from opening to discharge without constant attorney intervention.

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### KEY RESPONSIBILITIES

#### Probate & Trust Administration Expertise (60%)

##### **Probate Court Matters:**

- Draft, review, and e-file all California probate court documents (petitions, inventories, accountings, orders, notices, etc.)
- Manage probate timelines across multiple counties with varying local rules
- Coordinate with probate referees, beneficiaries, personal representatives, and court staff
- Prepare final accountings and discharge petitions
- Handle examiner notes, objections, and court communications

##### **Trust Administration:**


- Oversee post-death trust administration matters from initial client contact through distribution
- Prepare trust accountings, beneficiary notifications, and distribution documentation
- Coordinate with financial advisors, CPAs, and investment managers
- Manage asset retitling, beneficiary claims, and trust funding issues

#### Project Management & Integration (30%)

##### **Workflow Management:**

- Own the probate/trust admin pipeline from intake to closing for efficiencies and effectiveness.

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- Create and maintain matter-specific SOP, checklists and tracking systems to manage quality control practices
- Ensure deadlines are met

#### Team Coordination:

- Supervise and train administrative staff
- Review work product for accuracy before attorney review
- Delegate tasks appropriately and provide clear instructions with defined "definition of done"

#### Systems & Process Development:

- Document procedures and create training materials
- Build out standard operating procedures for recurring tasks
- Maintain and update Trello workflows, templates, and checklists
- Identify inefficiencies and propose solutions

#### Attorney Support & Communication (10%)

- Attend weekly production meetings to report status
- Prepare matters for attorney review with clear, concise summaries
- Draft client correspondence and status updates
- Handle routine client questions independently
- Flag complex legal issues requiring attorney input

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## REQUIRED QUALIFICATIONS

### Experience & Knowledge

- **Minimum 5 years** of California probate and trust administration experience
- Extensive knowledge of California Probate Code and local court rules
- **Proven experience with:**
  - Multi-county probate filings (Santa Clara, San Mateo, Alameda, Contra Costa, etc.)
  - Trust accountings and beneficiary reporting
  - Final distributions and discharge procedures
  - E-filing in multiple California counties
  - Asset valuations, inventories, and appraisals

### Skills & Competencies

- **Project management mindset:** You see the big picture and keep multiple plates moving
- **Ownership mentality:** You don't wait to be told what to do next; you anticipate needs
- **Training ability:** You can teach others and document what you know
- **Problem-solving:** You troubleshoot independently and know when to escalate
- **Communication:** Clear, professional written and verbal communication with clients, courts, and team

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- **Technology proficiency:**
  - Practice management software - Lawmatics (willing to learn new systems as needed)
  - E-filing systems (various county portals)
  - Microsoft Office Suite and Google Workspace
  - Trello or similar project management tools (or quick learner)

#### Personal Attributes

- **Self-directed:** Comfortable working remotely with minimal supervision
- **Detail-oriented:** Accuracy is a top priority
- **Calm under pressure:** Can handle high-volume work without becoming overwhelmed
- **Team player:** Collaborative approach; willing to help wherever needed
- **Growth-minded:** Eager to build systems that will help the firm scale

#### Certifications & Education

- California Paralegal Certificate (or qualification under Business & Professions Code §6450)
- Bachelor's degree preferred
- Advanced Certified Paralegal (ACP) in Estate Planning & Probate Administration a plus

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#### WHAT SUCCESS LOOKS LIKE IN THIS ROLE

##### 30 Days

- Complete onboarding and familiarize yourself with all active matters
- Shadow attorney and senior paralegal on 2-3 probate/trust admin matters
- Begin taking ownership of administrative tasks and routine filings
- Identify immediate process gaps and quick wins

##### 60 Days

- Independently manage 5-7 probate matters from court filing to completion
- Begin reviewing and providing feedback on administrative team's work
- Create your first three standard operating procedures
- Attend client meetings and begin building direct client relationships

##### 90 Days

- Own the entire probate/trust admin pipeline (with attorney oversight on complex issues only)
- Supervise administrative team's probate-related work
- Attorneys are reviewing your work in 3 minutes instead of 30 minutes
- Systems are in place so all proactive communication are active

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## 6 Months

- Management of day-to-day probate operations
- All matters have clear next steps and timelines
- Team members know their roles and responsibilities
- Making strategic recommendations for firm growth

## 1 Year

- Successfully closed 10+ probate matters
- Training materials exist for all common procedures
- Junior staff can handle routine tasks meeting all quality standards
- A trusted advisor to the attorneys on operational matters

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## ABOUT OUR FIRM

The Law Office of Janet L. Brewer is a boutique estate planning, trust administration, and probate firm serving families throughout the San Francisco Bay Area. We pride ourselves on providing compassionate, thorough service during some of life's most challenging transitions.

### Our Values:

- Client-centered service with empathy and professionalism
- Continuous improvement and systems thinking
- Collaboration over hierarchy
- Quality over speed (but we still need to be efficient!)

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## WHY THIS ROLE IS UNIQUE

This isn't just a paralegal position—it's a leadership opportunity to **build the operational infrastructure of a growing practice**. You'll have:

- ✓ **Autonomy:** Make decisions, build systems, own outcomes
- ✓ **Impact:** Your work directly enables firm growth and attorney effectiveness
- ✓ **Variety:** No two days are the same; diverse matters and challenges
- ✓ **Growth Path:** As the firm scales, you could grow into Practice Manager or Director of Operations for Probate and Trust Administration
- ✓ **Remote Flexibility:** Work from anywhere in California
- ✓ **Meaningful Work:** Help families navigate difficult transitions with dignity

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## APPLICATION PROCESS

### To Apply, Please Submit:

1. **Resume** highlighting your California probate/trust admin experience
2. **Cover letter** (required) addressing:
  - Your experience managing multiple concurrent probate matters
  - An example of a system or process you've built or improved
  - How you approach training and mentoring junior staff
  - Why this "integrator" role appeals to you beyond traditional paralegal work
3. **Work Sample** (optional but strongly preferred):
  - Redacted probate court filing you've prepared (petition, accounting, etc.)
  - Process document or checklist you've created
  - Email demonstrating how you've proactively solved a problem

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## EQUAL OPPORTUNITY EMPLOYER

The Law Office of Janet L. Brewer is committed to creating an inclusive environment for all employees. We are an equal opportunity employer and do not discriminate based on race, color, religion, sex, national origin, age, disability, veteran status, sexual orientation, gender identity, or any other protected status.

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## QUESTIONS and SUBMISSION?

Contact: Rod Cardinale  
Email: rod@calprobate.com  
Subject Line: "Senior Probate Paralegal Inquiry"

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**This is a career-defining opportunity for the right person. If you're a probate pro who's ready to lead, build systems, and make a massive impact—we want to hear from you.**