<u>Are You the One?</u>

Estate Planning and Elder Law firm with offices in Oregon, WI, **Brookfield, WI**, and Madison, WI is looking for an **experienced**, level-headed, A++ **estate planning attorney**. Base salary plus quarterly performance bonus structure up to $239,000. Plus 401(k) match, health, dental, life, disability benefits.

Instructions for application are at the end of this document.

We are a specialized law firm dedicated to providing a steady shoulder for our clients and their families as they age. We give our clients the best damned estate planning, elder law and probate services. We do this by living by our five **Core Principles** of

Love, **Compassion**, **Integrity**, **Teamwork,** and the constant **Pursuit of Excellence**.

Our founder, a retired Army JAG officer, leads this small but quickly growing boutique practice. We want members on our team who are smart and compassionate as well as ethical, professional, and trustworthy. You must be committed to helping others, and want to be an active part of an extraordinary team.

Estate Planning is Crucial
Do you want to work where we respect the estate planner instead of treating the practice area as an afterthought? You want to be a happy attorney? You want money? You want to earn the respect of your peers? You want work life balance to be with your kids? Our firm wants those things for you, too. You help the firm achieve its goals, and it will help you achieve yours.

We are seeking a **full-time** attorney to work in our **Brookfield** office, but would consider part time for a great candidate. Your schedule could be hybrid with WFH 1 or 2 days per week depending on client needs. You would be in the Oregon, WI office often in the first couple of months for onboarding and training on our systems. Once integrated, you can design your schedule to meet the clients' needs and your production benchmarks.

Breaking the Mold
You will be investing yourself to grow a firm and create a culture that will break the mold and change people's lives. Not only our clients' lives, but our team members' lives. You believe: "good enough" sucks; you push harder and achieve more.

You must understand and embody our **Core Principles**. We want clients to become raving fans. We strive to deliver an experience that is above and beyond the norm. You will be so awesome that you have a cult of raving fan clients.

Requirements
For this position, we seek an experienced estate planner who needs no supervision in dealing with planning for **taxable estates**. You already know your way around **GRAT**s, **ILIT**s, **SLAT**s. If you are not already familiar with the **Wealthcounsel** and **Eldercounsel** documents, you would need to learn them.

You will immediately be taking on client matters. You will be responsible for handling a demanding load of client meetings, drafting/review of documents, and occasional litigation. You will review your cases and progress with our owner weekly.

Our Systems
We have written forms and procedures for the estate planning process. You must be willing to fully adopt our existing systems, but also help us continuously improve them. You would have a drafting paralegal to input data and create the documents you design with the clients. Our Legal Assistant prints and flags the documents and scans and assembles the binders. You concentrate on the plan design, the document integrity, client education and question answering and the **client relationship**.

You will have measurable benchmarks (work accomplished and income generated) on a weekly, monthly and quarterly basis.

If you can supervise **probate** and **trust administration**, we can use that as well, but it is not required.

Pay
You will have a 90-day probationary/training up period where you learn our systems. Following that period, you are guaranteed $165,000 in pay and bonuses over the next 4 full quarters. Pay is at or above market including the ability to earn bonuses. Starting base salary will be $100,000 to $135,000 per year depending on experience and intangibles. Quarterly bonuses are based objectively on productivity numbers. Total compensation can realistically be over $200,000 annually plus benefits.

You are not required to bring in clients, but if you do, you receive additional bonus for those cases.

Team
We strive to become our best selves. We are a team that looks out for one another, and we all look out for our clients. We provide opportunities for our team members to grow personally, professionally, and financially.

Supervisory. As the attorney, you will be leading paralegals and other staff. It is important that you can do this as a member of a team, not as a dictator.

If you want to join an energized team like this, shoot us your resume and cover letter today!

What are some of the characteristics that you must have?

You see the **glass half full**. We have no place for toxic people and workplace drama. Our team is outstanding and does amazing work. We communicate all the time and openly. We acknowledge our mistakes and apologize when we have affected others negatively.

We are looking for someone who is not afraid of **Windows computers**. This will be your working environment, and we do not allow work on personal computing devices. You will always be learning new things that will make your work easier, but we can’t wait for you to learn Windows. You must be proficient with Microsoft Office and basic case management. Also, we’re looking for someone who not only "follows" policies and procedures, but also embraces them and are thankful they exist. In fact, if you get excited about creating new policies, procedures, templates, checklists, or systems because you know they make your life easier, you'll probably make your way to the top of our list.

We seek someone with enthusiasm for the work we do (and hopefully life in general). You must be able to focus, think clearly and **give advice compassionately**. You must be able to analyze client situations considering many variables, but also **think on your feet** and make smart decisions.

You also need to be **detail-oriented** and able to keep focus on the big picture at the same time. Even in a simple estate plan, the interaction between the words in one document and the words in a separate document can make a big difference in the efficacy of the estate plan. You must be able to keep the client's goals in mind while working on the minutia of precise document language. The right language can save money, time and confusion later when it matters.

We strive to work smarter. We help a lot of people protect their loved ones and create a lasting legacy. Efficiency helps us help more people.

You must be willing to go the extra mile to get the job done right the first time. In our practice, getting it done right the first time for our clients is very important. Sometimes there is no opportunity for a second chance.

You have emotional intelligence and empathy. You must be able to take coaching and suggestions well and deal well with people (clients, team members and referral sources). You must be a team player. Our team is growing, and you will be instrumental in that growth. We are strong believers in the team approach and our office is a team environment, so if you are not a team player, this is not the job for you.

You need to be able to talk to clients and staff in a manner that is **confident, kind, and candid**. Because we deal with folks of advanced age and varying education levels, you must have patience and the **ability to explain legal documents in common language**. Nobody here is impressed by lawyer talk. You might need to deliver difficult messages with compassion and without talking down, barking, or snapping. You must be able and willing to confront issues early and head-on to help the team grow and thrive. While it is important to show that you care about our clients, it is more important to actually care about them.

If, on the other hand, you realize that the work environment can help you get your job done efficiently, with other people who love their job, while helping people who really need it, allow you to earn a great income, and also have a life outside of work, then you are the type of candidate we would like to meet.

If hired, you will be part of a wonderful team of people who work hard to get the job done right the first time and take pride in the work that they do. You will be part of a team that is rewarded for their hard work.

Compensation is negotiable based upon experience and is subject to review after 90 days. The compensation package plan will give you some control over what you can earn working for our firm. If we succeed, you will too!

Is this going to be an easy job? No. It might be one of the biggest challenges of your life. But it is our belief that anything really great is worth working for, and that our greatest growth comes from our biggest challenges. You will be challenged. You will have fun. You will be compensated. You will still get to see your family, and take vacations.

If you think our office sounds like a fun place to be, this may be the job for you.

If this sounds harsh or unfair, then this is not the job for you. You should stop reading this ad right now.

If you have gotten this far and are thinking about applying, it means that you are ready for a challenge and want to be part of a team that helps people and rewards good work.

Desired Skills and Experience

Qualifications

- **5+ years of estate planning experience** required. Experience with taxable estates is desired, but not necessary.
- You must be good with basic technology. Experience with Windows 10 or 11 and Microsoft Office (Word, Excel, Outlook) is required. Experience with MS Teams, Adobe Acrobat Pro and Actionstep is preferred but not required.
- You must be a notary public or be able to be commissioned within a month.
- Excellent references are required.
- 3 years of estate and trust administration and probate experience is preferable.
- Applicant must be a graduate of an accredited law school and must be licensed to practice law in Wisconsin or able to be licensed within 3 months.
- Excellent communication skills, especially in highly stressful and emotional situations.
- Up-beat, self-starter, who has meticulous attention to detail, **common sense**, great interpersonal skills, and superior writing skills.

Your Primary Duties Will Be

- **Meeting with clients** to determine the best way to arrange their estate plans within their goals, desires, risk tolerance, and means.
- Supervising the drafting of the documents needed to execute the plan.
- **Explaining the plan** and supervising the signing of the documents.
- Periodically reviewing clients' older plans and suggesting updates.
- For probate and trust admin, supervising paralegals and making decisions, and appearing in court (including prep) when necessary.
- **Answering client inquiries** in a professional way with quick response time.
- Managing a dynamic caseload and staying way ahead of deadlines.
- Ensuring all legal work is completed efficiently, accurately, and on-time.
- **Tracking your work time**
- Reporting on all your work in progress.

Responsibilities

This role will work directly with clients and be the primary attorney on cases. From the initial "handoff" from our sales squad, all the way through the closing of the file, you will be responsible for helping the clients and the firm accomplish their goals.

We want someone with some real-world experience. Frequently, the best advice is not just legal advice - it's also personal, business or financial advice.

- With client input, design great estate plans for them within their chosen budgets.
- Assist clients effectively by understanding their needs, analyzing the situation, then strategizing and deciding on a proper course of action.
- Delegate to and review the work of paralegals and legal assistants.
- Discuss estate planning with clients to understand their needs, fears and desires.
- Advise clients regarding retirement plans, charitable giving, and insurance.
- Answer client questions about their estate plans.
- Work with Financial Advisors and Tax Professionals to design and implement plans.
- Collaborate with other attorneys and paralegals to effectively move files through the estate administration process.
- You should delegate to Paralegals and legal staff to accomplish tasks where appropriate but you remain responsible for ensuring the timely and professional completion of the work assigned.
- Monitor your caseload and move cases progressively forward and through the pipeline in accordance with defined milestones.
- Make recommendations on the design, deployment, and execution of policies, procedures, processes, checklists, templates, forms, etc. to create systems that run the business efficiently and profitably.
- Networking.
- Writing articles for our monthly newsletter.
- Keep your CLEs and law license up-to-date.
- Develop relationships with the community served and the leaders of that community

Other Requirements Include the Following

- Conveys confidence in person and on the phone,
- Shows empathy to clients and puts them at ease during challenging times,
- Demonstrates exceptional communication skills,
- Able to hold yourself and others accountable,
- A go-getter with a strong work ethic,
- Book of portable business is a plus.

Environment

- Small, boutique, reputable firm
- Competitive salary and bonus
- Balance between home and work life
- Supportive Environment where you're challenged with interesting work for interesting clients

We Value Our Team and Offer The Following

This position has competitive compensation, a good work-life balance, and opportunities for career growth. We offer a Retirement Plan with an employer contribution. Paid holidays and PTO for employees who work full-time. We also can assist with continuing legal education.

- Health Insurance
- 401(k)
- Paid Holidays
- Paid Vacation / Sick Time
- Life Insurance
- Continuing Education Budget
- Individual office

Why Work With Us

GREAT PAY and BENEFITS

FLEXIBILITY IN WORK SCHEDULE

STABILITY & GROWTH

PURPOSE Our purpose is to be a steadfast family friend to our clients. We do this through Estate Planning, Elder Law and Estate Administration services and advice.

We help Elders and their loving families to protect their life savings in the face of devastating costs of nursing care.

VISION Our firm envisions a world where lawyers are seen as counselors and trusted advisors who enhance the lives of their clients through holistic counseling and service.

All qualified applicants will receive consideration without regard to race, age, color, sex, religion, national origin, disability, sexual orientation, gender identity, marital status, military status, genetic information, or any other status protected by applicable laws or regulations.

HOW DO I APPLY?

Please note that your ability and willingness to follow these instructions explicitly will play a big role in whether you will be considered for this position. Do not use the reply option on this ad. Email the following documents to the email address jobapplicants@friendly.law, in PDF format only, with "[insert your full name, spelled backwards] is your Attorney" in the subject line:
1. Your résumé.

2. Cover letter including the following in bullet-point format:
• Normal letter format addressed to Atty. Dan Krause at the firm's Brookfield, WI address below.
• How can you deliver value to a client going through probate of their loved one?
• How can you deliver value to an elderly client unsure about their future?
• What are you looking for in this position, financially, professionally, and personally?
• What you liked and did not like about this ad. (You can be honest; we will not hold it against you.)

• Name of one great movie you have seen or book you have read in the last twelve months, and why you liked it so much.

Thank you for taking time to consider joining our team!

KRAUSE ESTATE PLANNING
& Elder Law Center
15850 W Bluemound Rd, Ste 314
Brookfield, WI 53005
414-285-1082