

## **Job Description: Associate Attorney – Advanced Estate and Tax Planning**

**Company Overview:** Baker Law, Ltd., located in Perrysburg, Ohio, is a distinguished law firm with a multi-state practice specializing in advanced estate and tax planning and estate and trust administration. For more information, please visit [bakerlawtld.com](http://bakerlawtld.com).

### **Position Overview:**

We are seeking an Associate Attorney to join our legal team. This role will focus on advanced estate and tax planning for high net worth and ultra-high net worth families and individuals. The successful candidate will demonstrate a strong background or interest in estate and tax planning.

### **Main Responsibilities:**

- Provide comprehensive estate planning services including drafting wills, trusts, and other estate planning documents.
- Develop and implement tax-efficient strategies for wealth transfer and estate planning.
- Develop and implement strategies for asset protection, business succession planning, and charitable giving.
- Conduct thorough legal research and analysis to support estate planning and tax strategies.
- Stay current with changes in tax laws and regulations affecting estate planning.
- Collaborate with clients' financial advisors, accountants, and other professionals to ensure a holistic approach to wealth management.
- Assist in the preparation and filing of estate and gift tax returns.
- Participate in client meetings and presentations, explaining complex legal concepts in an understandable manner.
- Maintain client confidentiality and manage sensitive information with the highest level of integrity.

### **Qualifications:**

- Juris Doctor (JD) degree from an accredited law school.
- Admission to the Ohio bar and in good standing.
- Minimum of 1 year of experience in estate planning and tax law, preferably with HNW and UHNW clients.
- Strong understanding or demonstrable interest in developing a strong understanding of federal and state tax laws, including estate, gift, and generation-skipping transfer taxes.
- Excellent analytical, research, and writing skills.
- Ability to communicate complex legal concepts clearly and effectively.
- Proven ability to manage multiple clients and projects simultaneously.
- High level of professionalism, integrity, and ethical standards.
- Proficiency with legal research tools and estate planning software.

**Compensation and Benefits:**

- Competitive salary commensurate with experience and comparable to large Toledo metropolitan law firms.
- 401(k) plan with matching contributions.
- Payment of bar fees and continuing legal education (CLE).
- Salary adjusted to compensate for single health insurance coverage (health insurance not provided).

**Application Process:**

Interested candidates should submit a resume and cover letter demonstrating their knowledge and experience or demonstrable interest in estate planning, particularly with taxable estates. Please email your application to Chad Baker at [chad.baker@bakerlawltd.com](mailto:chad.baker@bakerlawltd.com). Applications will be reviewed on a rolling basis until the position is filled.