



Title: Estate Planning Advisor

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

The **Estate Planning Advisor** is responsible for assisting wealth managers in the firm to deliver a visual representation that maps out the estate plan for prospective clients.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Read and analyze a high volume of estate planning documents such as wills, revocable and irrevocable trusts, and power of attorney designations
- Provide standard recommendations when appropriate
- Track workflow and provides the completed diagram to wealth managers in a timely manner

REQUIRED EXPERIENCE / QUALIFICATIONS

- Bachelor's Degree or Paralegal Certificate
- 2 to 5 years of relevant work experience
- Ability to review estate planning documents with a great degree of accuracy
- Proficiency in PowerPoint

PREFERRED EXPERIENCE / QUALIFICATIONS

- Juris Doctorate
- Licensed and in good standing with the bar of one state

Salary Range: \$85,000 - \$100,000

