

The Paralegal Job Description

The job description for paralegals can depend a lot on the setting or industry sector in which they work:

Banking and Finance

A paralegal's job description in the banking and finance sector can depend on whether the firm they work for acts as bond counsel, underwriters' counsel, disclosure counsel, or special tax counsel.

In general, job duties and responsibilities include:

- Draft documentation such as leases, deeds, resolutions, agreements, opinions, and other legal documents
- Reviewing documentation to ensure it adheres to state law or federal tax requirements
- Participating in due diligence review
- Reviewing ordinances or other regulations to ensure legality of bond issuance
- Communicating with clients and other participants involved in the bond transaction to coordinate document review and timing matters
- Assisting attorneys in research, drafting, and the revision of bond issue documents
- Reviewing primary financing documents to determine whether conditions for closing have been satisfied

Bankruptcy Law

Paralegals in bankruptcy law work with attorneys that provide debtor representation.

Their job duties include:

- Participating in client interviews with attorneys
- Gathering facts for petition, schedules, and statements preparation
- Discussing credit counseling and financial management courses with clients
- Conducting client interviews to obtain information and documents related to debts vs. assets
- Conducting asset search and obtaining debtor's credit report to ensure compliance with complete disclosure
- Drafting motions, proposed orders, and notices regarding time extensions, lien avoidance, and claims
- Keeping clients apprised of hearings, trials, and deposition dates
- Reviewing debtor schedules, statements, and disclosures for compliance with U.S. Bankruptcy Code

Corporate Law

Paralegals in the corporate environment work with attorneys who are involved in the incorporation and formation of corporations, limited liability companies, and limited partnerships, as well as dissolutions, mergers, and acquisitions. Some of their job duties include:

- Performing due diligence, including UCC searches and good standing certifications
- Drafting entity formation documents
- Drafting organizational documents, including articles of incorporation and fictitious name registration
- Drafting and filing various federal and state forms, including SEC filings
- Monitoring and reporting changes in filing, reporting, and franchise tax laws
- Drafting documents for board meetings
- Preparing and filing annual reports
- Drafting special minutes for corporate activities
- Supporting corporate records retention and maintenance
- Maintaining accurate database of all pending or threatened litigation

Criminal Defense Law

In criminal defense settings, paralegals are involved in pretrial, investigation, pretrial motions, and discovery response activities, including:

- Locating and interviewing witnesses
- Verifying information
- Reviewing state's evidence with attorney
- Assisting in the development of defenses, theory of case, and trial strategy
- Drafting applicable motions, requests, and responses
- Supervising marking of exhibits
- Obtaining copies of court documents, such as arrest records, search warrants, and prior records
- Locating evidence and exhibits
- Assisting in jury selection
- Attending pretrial conference with attorney
- Coordinating the appearance of witnesses at trial

Environmental Law

Paralegals in environmental law work alongside attorneys on environmental enforcement cases. This often includes assisting the attorney with lobbying, drafting proposed legislation for clients, and developing memorandums of understanding for

mutually beneficial projects between clients and governmental agencies. Job tasks often include:

- Preparing civil or criminal enforcement referral packages to attorney general's office
- Reviewing new or pending legislation for agency impact
- Preparing administrative rules for to be adopted
- Responding to public inquiries for agency documents
- Drafting petitions for formal administrative hearings
- Responding to agency requests for information
- Analyzing information received from factual investigations
- Researching case law pertaining to site specific environmental issues

Estate Planning

Paralegals working with attorneys in estate planning oversee the preparation of documents and other activities surrounding estate plans. Job duties and responsibilities in this setting include:

- Preparing tax calculations necessary for estate plans
- Participating in client interviews to begin fact gathering
- Reviewing current estate plans and advising the attorney of the results
- Preparing drafts of wills and trust agreements
- Drafting documents necessary to fund trusts and sever joint tenancies in common
- Supervise/witness the execution of wills and trusts
- Arranging for beneficiary changes or changes of insurance policy ownership
- Recording deeds and trade name affidavits

Family Law

Paralegals working with attorneys in family law settings must often perform the following job duties:

- Conducting initial interviews with clients to obtain information for pleadings
- Preparing pleadings, such as petitions, summons, responses, and waivers of service
- Creating and monitoring deadlines for case progression
- Conducting witness interviews
- Drafting affidavits in support of temporary relief motions
- Working with client to gather and compile financial information
- Working with accountants, financial advisors, brokers, and other financial experts retained on behalf of the client

- Analyzing proposed settlements for attorney's review
- Assisting in drafting briefs and memoranda
- Preparing documents for transfers of assets
- Applying statutory regulations to calculation of child support and medical support orders
- Drafting motions and pleadings with regard to civil and criminal contempt proceedings in juvenile and common pleas court

Litigation

Paralegals in litigation work alongside attorneys enforcing or defending a legal right. This may include personal injury, public interest, commercial, and civil litigation, among others. Their job duties in this setting often include:

- Conducting fact investigation and analysis
- Participating in client interviews
- Interviewing witnesses, including obtaining affidavits and written statements
- Analyzing documentary evidence
- Participating in formulation of discovery plan and drafting discovery requests
- Conducting legal research related to pleading and motion preparation
- Preparing witness files
- Organizing and analyzing documents, including medical records
- Preparing demonstration exhibits, pretrial notebooks, and other pretrial documents
- Preparing trial subpoenas and coordinating scheduling of witnesses
- Drafting settlement agreements
- Drafting motions and stipulations for dismissal