



VIRTUAL PARALEGAL ASSOCIATES

Superior Paralegal Services in Trusts & Estates

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MAGAZINE

Trends in the Paralegal Industry



Interview with Rebecca Cullen

Rebecca, thanks for joining us, excited to have you contributing your stories and insights. We'd love to start by getting your thoughts on what you are seeing as some the biggest trends emerging in your industry...

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As a paralegal in the Trusts and Estates field of law for over 40 years, I have witnessed first-hand monumental changes in the profession over this period of time. The most impactful change being that of the ability to work remotely.

An instrumental contributor to these changes is the technological advances that have occurred in this span of time. 40 years ago, paralegals relied heavily on paper – document preparation often occurring on word processors or typewriters. Document review, filings, and research were done manually with tangible tools, requiring significant time spent handling and organizing paper files – with very little of it readily accessible among the entire practice. In addition, contrary to the paralegal courses in education readily available today, the majority of the education I received in my chosen genre was literally learning on the job (I was very fortunate to have had amazing mentor attorneys).

In 2014, I left the corporate law firms and formed Virtual Paralegal Associates of New York, LLC. At that time, I was not aware of any remote paralegal services but my entrepreneurial spirit lead me to today where I am enjoying my profession more than ever.

My company was well ahead of the game when, in 2020, the Coronavirus Pandemic hit. Armed with the technological advancements of cloud computing, collaborative and case management tools, and platforms for transferring and storing information, we were already navigating remote work, proving its effective and efficient in assisting law firms. The Pandemic's biggest impact on my company significantly opened up the pool of talent, enabling me to more easily create the amazing team of paralegals that support VPANY today (many of our team working remotely for the first time in their careers).

The Pandemic absolutely created the largest shift toward remote assistance. The rise in the legal professionals wishing to work remotely has forced law firms in many instances to follow suit, where they find that hiring a remote paralegal is actually cost-effective by:

- Saving firms the overhead costs of a designated office space.
- Negating the need to provide benefits such as health insurance, retirement fund contributions, vacation, and sick pay, and more.
- Solo practitioners and small law firms readily use remote/virtual paralegals when they have fluctuating workloads and do not necessarily maintain the workload to support an in-house paralegal.

- For the old school attorneys, even they find that virtual paralegals are a resourceful outsourcing tool when their in-house paralegal goes on maternity leave or is otherwise absent, or if they have a large project that requires attention beyond the limitations of the existing staff.
- Remote workers significantly reduce the time required by a firm's Human Resources (such as initial orientation and introductions, training, break-times, covering for absences, and negates any drama surrounding employee conflicts).
- Contracting a virtual paralegal, instead of a temp or full-time in-office paralegal, saves on agency hiring fees or spending countless hours in training, with work performed as needed, with no down time or wasted hours with washroom breaks, coffee breaks, or office chitchat.

Contrary to 40 years ago, paralegals currently take on a much more independent role in the legal field. Many of the tasks that an attorney once performed are now delegated to the paralegal professional.

There are indeed risks associated with hiring remote paralegals, including communication issues that can occur if proper communication tools are not established. I have learned so very much in the past decade as I continually expand my company's processes and procedures with the advent of new technology. In addition, attorneys hiring remote paralegals must ensure that the remote worker is capable of remotely handling sensitive and confidential information through effective data security protocols, adhering to strict data security procedures to ensure compliance with legal regulations and rules of professional conduct. From my side of the fence, relating to hiring remote workers, I have found that it's not for everyone. I have had a handful of paralegals who miss the social interaction that a traditional work environment provides, or they lack the ability to work so independently.

In 2024, Keeley P. Mitchell, associate professor of business at Delaware County Community College, distributed a survey to several Eastern Pennsylvania paralegal associations and some national paralegal groups and organizations to study the landscape of remote paralegals. The study revealed that 82% of the participants work remotely in some capacity, with 32% completely remote, 28.5% working remotely a couple of days a week, and 21% working remotely the majority of the week. Only 14% were solely in-house. 40 years ago, I believe one would be hard pressed to find even one paralegal who worked remotely. Approximately 70% of the para-professionals in the survey reported improved mental health in addition to flexibility, productivity, professional satisfaction, and positive steps in career advancement. I truly believe that this is akin to "happy wife, happy life."

I am so grateful to be able to work remotely (to have the blessing of a quiet office, to not have to travel in the poor weather, the freedom and autonomy to choose how I spend my time, to be able to select who I surround myself with). I am beyond grateful for the amazing team that I get to spend my time with, whom I can count on daily, who I have come to call family. I am grateful for my company's amazing attorneys who have snowballed into life (I have never advertised my company – most of my clients are by referral). I remain grateful for the opportunity for the eternally rewarding experience of assisting the families of the matters for which we have been entrusted.

Rebecca, love having you share your insights with us. Before we ask you more questions, maybe you can take a moment to introduce yourself to our readers who might have missed our earlier conversations.

I am a life-long, senior paraprofessional who formed the company, Virtual Paralegal Associates of New York, LLC (VPANY), in 2014. I am an energetic and disciplined entrepreneur who thrives on creativity and connection. With a knack for problem-solving, I enjoy turning ideas into reality while ensuring everyone feels valued along the way. My passion for helping others drives me to create meaningful experiences, whether in business or everyday life. I believe that intelligence isn't just about knowledge — it's about understanding people and making a positive impact in their lives.

I hold over 40 years of experience in the Trust & Estate field of law. I first learned for my love of law while serving in the U.S. Navy right out of high school, and getting my first taste of the judicial system with JAG work (I am grateful to recount the years that I spent in the F-14 squadron where and when the first Top Gun was filmed). After a four-year tour in the Navy as a consistent 4.0 sailor and achieving honors and medals, including the prestigious Navy Achievement Medal, I returned to my home state of New York, where I immediately landed a legal secretary position with a highly respected Glens Falls, New York law firm. I spent the next 17 years under the tutelage of a past New York State Bar Association Trust & Estates Section President, which provided me with the base of my knowledge that I have consistently expanded upon since.

Upon moving to Niskayuna, NY, where my husband, Tom Cullen, was a partner in a litigation law firm, I decided that I did not wish to “start anew” in-house. Hence, the formation of VPANY, along with the formation of a not-for-profit company, Lending Hearts & Hands, LLC (“LHH”). With VPANY, I made a few cold calls and landed a couple of my first attorney clients (who are still VPANY's treasured clients today, Adler & Adler, PC and Wellerstein Law Group, PC). After volunteering for the American Cancer Society for several years (bringing our town's Relay for Life to its highest fund-raising in its 20-year history might I add), and wanting to help on a more personal level, I devoted most of my time and

efforts (with the help of my husband and a team of other volunteers) to LHH. LHH's mission was to raise money to assist locals diagnosed with cancer, providing them with the funds to assist with co-pays, health insurance premiums, car repairs, essential medical items, etc. I led LHH until 2019 when I was forced to wrap up my philanthropic efforts to care for my 86-year-old live-in mother-in-law and my terminally ill mother who resided in Kentucky (lots of singing of "on the road again..."). After the exhausting efforts in helping both of my moms until their deaths, and a bit of time spent to recover and re-group, I focused my attention to VPANY. I added more clients, started forming a team to assist with the ever-growing client base, both of which snowballing with the onslaught of the Pandemic.

Today, VPANY consists of over a dozen paralegals and other professionals who collectively form a company that provides exceptional paralegal services to Trust and Estate attorneys (and CPAs) across the nation. With dozens of attorney clients (from solo practitioners to international law firms) and CPAs, which number increases almost weekly, so does my never-ending search for talent to add to our amazing team.

VPANY assists attorneys with all aspects of Trust and Estate work, from A-Z, including:

- Fiduciary appointment
- Marshaling of assets
- Accounting
- Judicial and non-judicial settlement
- Compromise actions
- Real estate and co-op transfers
- Estate tax returns
- Gift tax returns
- Preparation of Last Wills and Testaments, Trusts, Powers-of-Attorney, health care documents, etc.
- Trust funding
- Guardianship proceedings
- Estate litigation
- Mobile and online (RON) notary services (globally)
- Estate concierge services, including post-death cleaning, asset valuation, courier services, court visits, document execution witnesses, service of process
- Time entry and invoice preparation
- Mass mailings
- Special requests (inventorying of artwork, etc.)



Our team is dedicated to supporting families during their toughest moments. We pride ourselves on being not just knowledgeable but also empathetic and kind. With a laser focus on our clients' needs, we provide compassionate legal assistance that our attorneys and their clients can rely on. We understand that navigating the court system can feel overwhelming. We are passionate about empowering our clients and theirs with the knowledge and support they need to navigate through the various processes with care and understanding.

What's been the best source of new clients for you?

The best source of new clients for my company has been word of mouth from existing clients. With a keen eye for detail and a mindful approach, my team strives to create experiences that not only meet but exceed expectations. Whether it's a small project or a major endeavor, we pour our hearts into every task, ensuring that each client feels valued and heard.

How about pivoting – can you share the story of a time you've had to pivot?

One of the most difficult times in my career and life was when it became necessary to care for my two elderly mothers at the end of their lives.

After suffering from strokes in 2019, my mother-in-law moved in with us from Florida, requiring around-the-clock care. Also in 2019, my mother (residing in Kentucky) was diagnosed with a very rare disease, Corticobasal Degeneration. Both situations nearly impossible to endure as we blindly navigated through to the end. I was on the road every other week between Kentucky and New York (with my beloved Golden Retriever also dying), except for a three-month stint in various Kentucky hospitals with my mother. Obviously, navigating end of life with the two matriarchs of our families was wholly riddled with uncertainty and the deepest of emotions.

Anyone who has cared for an elderly person at the end of their lives will undoubtedly understand the toll that the situation places on the entire family. For my moms, they exhibited anger with the loss of their independence and diagnoses, frustration as their bodies failed them, sadness as they recognized that their time has come to an end.



I will be forever grateful with the ability to work as a remote paralegal during the entire time (from beside hospital beds or in hotel rooms) so that I could support both amazing women during their final days. It also provided me with a much-needed escape throughout the day, turning my attention to the management of my company and team. In the end, the experience has only deepened the empathy and understanding required for our clients.

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