



Plan Today to Secure your Tomorrow

CLIENT SERVICES DIRECTOR FOR OUR FAMILY-FOCUSED LAW PRACTICE

Would you love to help families in our community do the right thing for the people they love? Have you worked in financial services, handled real estate closings or helped clients complete insurance applications? Are you self-motivated, easy to get along with, and detail oriented? If so, you might be the key team member we are seeking.

Legacy Life Plan LLC is a family oriented entrepreneurial law firm with a mission of making the lives of families [and small business owners] better and we are seeking a sharp, driven, friendly Client Services Director to become part of our team for the long-term.

This is a full-time, salaried position with a lot of room to grow, as we are just in the process of establishing our systems, and will need you to take the lead on implementation and execution on our behalf, using the technology and training we've invested in to support you.

Our office is located in Boca Raton, Florida. We are open typical business hours, and you will be expected to work the bulk of your hours within that time frame.

You **MUST** be "tech savvy" and able to handle working with several different databases of information. One of your most critical and immediate jobs will be to learn, understand and master the various systems that support us to serve our clients and ensure they have a "Wow!" experience every time they interact with our office.

We are a very small team, which means you will need to figure some things out on your own and be able to creatively problem solve to create more efficiency in the delivery of our service.



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If you are the right person, you'll be ready to jump in and make coffee or fill the printer with paper, when that's necessary. But, the most important part of your job involves talking with our prospects who are curious about our services, educating them about our process, and then once they hire us, ensuring that we get their chosen estate plan completed, signed, delivered and done right.

In the early days of our work together, while in training to serve clients, you may be helping with our marketing efforts, getting our lawyer out in the community, setting up speaking engagements, identifying expos for us to attend, exhibit and speak at, and auctions where we can contribute, and otherwise getting our firm seen and heard in the community.

Then, you will follow up on leads and set appointments for what we call a "Family Wealth Planning Session" during which we consider family dynamics, assets and what the ideal plan is for each family we work with. From there, you will help us deliver on the chosen planning solutions for each client.

You must be able to think on your feet and make smart decisions. Is this an easy job? Definitely not. However, the potential for growth and long-term employment is high, and if you've been seeking to work in a family atmosphere where you can make a real impact in the lives of the people in our community, we would love for you to apply to work with us.

Compensation will include base pay + bonuses based on reaching overall goals of the practice. We will be transparent about the firm goals, and how you will contribute to the firm meeting those goals.



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If you would love to grow with us for the long-term, and you are able to support us to serve our clients as THE go to lawyers for families [and small business owners] in our community, please apply as follows:

Send us a letter that clearly conveys WHY you would be a great fit for our team with details about your past experience working directly with clients, working within various technology platforms, and how working with our office fits into your long-term career plans. Please include your base salary requirements plus your ideal compensation as we work together to hit our goals. BONUS: if you add a video with these details to your application, we'd love to see your personality shine through as part of your application.

If you know your Kolbe, Human Design, Enneagram Type, DISC, Gallup StrengthsFinder or any similar "work style" types, please include that information in your letter or video.

Please put "I'm THE ONE" in the subject line of your email. Any emails without the correct subject line won't be opened. Email your resume to resume05055@gmail.com