Senior Counsel
Farm Succession & Legacy Preservation

Wright and Moore Law Co. LPA-Delaware, OH
Competitive compensation based on qualifications and technical requirements, benefits offered, non-remote, M-F, overtime pay exempt. Possible equity track available.

Firm Overview

Wright and Moore Law Co., LPA is seeking an experienced, organized, detailed, curious, communicative, and engaging attorney to join its team. Wright & Moore is a growing boutique law firm located in Delaware and in Celina, with farm and rural clients spanning across the state. The firm focuses on the unique legal needs of farmers and their families, landowners, and other rural businesses. The position is part of a long-term growth strategy and is essential to support our main practice area. Wright & Moore proudly features a technology-centric, paperless, casual workplace, and personal life-forward culture. Frequent 40+ hour workweeks will be required for project flow, business goals, and potential equity eligibility.

Mission, Vision, Values

<u>Our Mission:</u> At Wright & Moore, we promote thoughtful, educated decision making among Ohio farmers and landowners in order to achieve the succession planning goals of their families and businesses.

<u>Our Vision:</u> To maintain a strong agriculture industry and vibrant rural communities through multi-generational transitions of Ohio family farms and farmland.

<u>Our Core Values:</u>
With our clients, our partners, and our team in mind, Wright & Moore adheres to these core values:

- **Knowledgeable:** Through various legal education and personal development efforts by our team members, we will provide competent counsel that stays in-tune with the laws and rules impacting our industry.
- **Individuality:** Recognizing that each family, farm, legal issue, and employee possess unique goals and features, we strive to provide solutions and opportunities that cater to the needs of each client, partner, or team member.
- **Empathy:** Being accessible to our clients, partners, and team members, staying curious to individual needs, actively listening, and understanding all viewpoints will ensure we are empathetic to each other and to the public.
- **Integrity:** “Doing the right thing” comprises our moral and ethical core, and building and maintaining trust within our team and our stakeholders is of the utmost importance.

- **Family Team:** Collaboration, communication, flexibility, and support can lead a family to accomplish great things together, and we seek to espouse those behaviors internally within our team and externally with members of our firm family.

Responsibilities

Farm Succession: Craft farm succession plans with the ultimate goal of inter-generational transfer. Draft various complex trusts including revocable, irrevocable, and others, along with specialized wills. Manage asset spreadsheets and diagrams summarizing full plans and distributions. Conduct rough estate valuations and estate tax vulnerabilities. Critically analyze plan vulnerabilities and propose unique planning solutions. Employ cash flow and tax minimization strategies to improve plan viability. Understand the role of family dynamics in overall plan. Assemble and understand business-planning forms featuring ownership and management restrictions, along with the role of discounting. Grasp an array of real estate filings and Secretary of State business filings and incorporate into plan. Mediate family meetings to resolve disputes related to estate or business plans. Assemble settlement agreements and other unique resolution documents. Attend legal education programs to sustain legal or tax knowledge base and relay teachings to peers.

Legacy Preservation: Execute will and trust plans in a timely, accurate, efficient, and caring manner. Prepare and file probate documents. Coordinate administration tasks across all team members. Communicate professionally and accurately with opposing counsel within an administration. Calculate allocations among various sub-trusts. Assemble accurate accountings, valuations, and administration summaries. Advise regarding special tax elections, business valuations, and asset valuations. Manage conflict among beneficiaries within a plan. Draft private settlement agreements if disputes arise. Facilitate business buy-outs and beneficiary buyouts. Prepare federal estate tax returns

Teamwork: Lead client signing and administration meetings alongside legal assistant or co-counsel. Prepare matter directives and action items post-meeting. Provide positive feedback to team members regarding document drafting and project directives. Actively engage coworkers in office-wide meetings or by digital means to discuss task, plan, and administrative matters. Employ daily open-door approach that allows for questions from across the firm. Correctly input entries to timekeeping program. As projects are completed, prepare and approve bills for client matters.

Client Care: Proficient and timely in-person, phone, and email interactions with clients, accountants, investment, insurance, and lending professionals will be required. Assist with set-up of new client files, intake forms, and contact information. Be responsible for reporting client or matter updates to support team, client file management, maintaining correct information, and necessary follow-up with clients. Adhere to firm procedures regarding client file storage, titling, and structure.

Ethics: Exhibit consistent adherence to the Ohio Rules of Professional Conduct for legal practitioners. Display best practices related to organization, attention to detail, timeliness of filings, and client communication. Obtain conflict waivers and engagement letters as needed. In limited instances, manage client trust funds.

Community Relations: Serve as a professional extension of the firm in Ohio agricultural and legal communities. Prepare and provide educational presentations to industry groups, prospects, partners, and clients. Plan and host biennial industry networking event. Draft thoughtful yet digestible written material for industry publications and Client Advisory Newsletter. Attend industry events to maintain the firm's presence among industry leaders. Join community groups to provide pro bono legal services. Serve as a leader on Ohio agriculture and legal industry trade groups.

Experience and Qualifications

- Demonstrated upbringing in farming, industry experience, and commitment to advancement of Ohio agriculture
- At least five years' private practice experience focusing on estate planning, business planning, wealth management, real property, and estate administrations
- Intimate knowledge of estate and income tax rules strongly desired
- High comfort with estate, business, and real property instrument drafting
- Demonstrated adherence to the Ohio Rules of Professional Conduct
- Advanced competence with various online billing systems, task management platforms, Office Suite programs, document automation programs, and mobile apps
- Excellent verbal and written communications skills, inquisitive skills, strong interpersonal skills, an eye for organization, timeliness, attention to detail, and a self-starting approach to your work
- Ability to independently handle multiple tasks and projects simultaneously

Salary and Benefits

Competitive compensation based on qualifications and technical requirements, full-time, potential hybrid work, M-F, overtime pay exempt. Benefits include paid holidays, paid time off, health and dental insurance, life insurance, retirement matching, cell phone, laptop, CLEs, licenses, memberships, and conference travel. Annual bonus possible at discretion of management based on meeting individual goals and firm performance. Possible equity track available.