Coordinator, Client Relations

Wright and Moore Law Co. LPA & Farmers Title Co.
Competitive compensation based on qualifications, benefits offered, non-remote, M-F, overtime pay exempt.

Firm Overview

Wright and Moore Law Co., LPA is seeking an organized, detailed, communicative, and engaging coordinator of client relations to join our team. With a growing business, this coordinator would be an instrumental piece of the Wright & Moore family. 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 attorneys and office as a whole. The firm proudly features a technology-centric, paperless, casual workplace, and personal life-forward culture. However, due to the seasonal nature of agriculture, occasional 40+ hour workweeks may be required for project flow and business goals.

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

Client Care: Provide a warm, positive, and welcoming experience for clients and partners from arrival through departure. Make a hospitable first impression that coincides with the casual, family-friendly environment of the firm. Handle client meeting requests, compliments and concerns, communicating such issues to the Client Relations Director and other team members when necessary. Be responsible for the set-up and maintenance of new client files, intake forms, contact information, conflict checks, and fee agreements. Input information into client program. Share file requests with clients to upload documents. Must scan and appropriately save all legal and office documents in company network drives. Directly assist team members with client meetings and signings.

Office Management: Open and close office each day. Coordinate daily office work flow and schedules. Keep office organized, clean, well maintained, and aesthetically pleasing. Assemble client business and estate planning binders, estate planning packets, and closing packets. Deliver specialty mailing to UPS or post office in timely manner. Comply with client written information security plan. Adhere to firm ethical practice standards. Collaborate with Client Relations Director or Chief Operations Officer when needed regarding other firm-wide functions. Assist in the planning of office, social, and company events.

Communication: Primary office phone contact. Schedule appointments with clients and partners. Maintain firm calendar. Promptly reply to client, team member, or partner communications. Handle and distribute firm mail to team members. Prepare and send emails and faxes regarding client issues and requests. Respond to communications from clients and other professionals. Pull together client and partner mailing list. Assist with specialty mailings to clients and partners. Prepare and send client sympathy, thank-you, or congratulations cards.

Team Assistance: Prepare initial folders for farm succession matters. Promptly and accurately send mailings on behalf of business and legal teams. Assist with coordinating and scheduling attorney conferences, meetings, memberships, and travel if necessary and assist with general tasks that will allow the attorneys to concentrate on clients and quality of work. Assist legal team with closings and document signings. Log administrative fees for client bills. Adopt and maintain digital file management strategy ensuring clean, easy to navigate office hard drives.

Reporting & Collaboration

This position works under the general guidance of the Client Relations Director and collaborates closely with other client-facing team members, as needed. Responsibilities may include supporting client intake, onboarding, scheduling, and communications, with priorities and workflows coordinated in partnership with client relations leadership. Reporting structure and day-to-day collaboration may adjust over time based on firm needs, staffing, and operational priorities.

Experience and Qualifications

- An associates degree and at least 3 years equivalent experience in a professional office setting are required
- Advanced technological competence with various online platforms, Office Suite programs, copy, print, and mail systems, digital signature, file sharing, and mobile apps
- Exhibition of client-first mentality is essential, including prompt responses to communication, empathy for difficult conversations, and attentiveness
- Must possess excellent verbal and written communications skills, inquisitive skills, strong interpersonal skills, a team mindset, an eye for organization, and a self-starting approach to work
- Serve as notary public
- Disciplined mindset while working that ignores distractions and stays on task
- Strong work ethic, timeliness, and attention to detail are must-haves
- Professional, positive, patient, and engaging demeanor
- Willingness to both participate constructively in a team setting and direct team or attorney responsibilities
- Ability to independently handle multiple tasks and projects simultaneously and in an organized manner
- Passion for the agriculture industry and assisting rural families is a plus

Salary and Benefits

Competitive compensation based on qualifications, full-time, non-remote, M-F, overtime pay exempt. Benefits include paid holidays, paid time off, health and dental insurance, life insurance, and retirement matching, technology, education, and memberships. Annual bonus possible at discretion of management based on meeting individual goals and firm performance.