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Corporate Paralegal – Job Description

JOB SUMMARY

Under the supervision of the General Counsel, primarily responsible for managing and processing realized estate and trust gifts, administering life income gifts, and other duties related to contracts management, legal correspondence, corporate records and compliance, and board support. Provides compliance support to a number of assigned areas by performing critical analysis and reviewing relevance of legal issues (cases, statutes, and regulations); based on this review, makes strategic recommendations on actions and processes to ensure compliance.

ESSENTIAL DUTIES

- Deliver exceptional customer service
- Embrace the Foundation’s mission and a culture of belonging and collaboration with each other and our colleagues

BEQUEST ADMINISTRATION

- Manage processes for realization of bequests designated to the Foundation, the University and the University of Colorado Hospital.
- Serve as primary contact for fiduciaries and third-party payees, e.g. Fidelity, TIAA, with respect to monies designated to the Foundation /University by deceased donors.
- Review all documentation related to estate distributions, including inventories and accountings, and raise issues/concerns when appropriate.
- Prepare documentation required to collect assets from applicable fiduciaries and transfer assets to the appropriate Foundation funds in accordance with donor intent.
- Process bequest funds, document in donor database, and initiate gift fund set ups.
- Perform bequest administration in coordination with Advancement planned giving team and campus partners.
- Assist with probate litigation activities as needed.

LIFE INCOME ADMINISTRATION

- Provide administration for planned gifts, including 1) drafting and reviewing documents; 2) preparing gift illustrations for donors and development officers; 3) working with trust administrator to set up, maintain and close life income gifts; 4) working in coordination with Advancement planned giving team; 5) communicating with donors (ABRs, quarterly reports, address changes, etc.), external trustees, personal representatives, attorneys related to internal/external trusts and estate gifts; 6) filing of trust registrations with probate court.

PROVIDES SUPPORT TO GENERAL COUNSEL

- Contract administration (reviewing, drafting, editing and routing through the closing processing).
- Risk management (maintain relationship with third-party administrators/consultants, completes annual review and renewal of policies, submits claims, pays premiums).
- Departmental office administration (general legal correspondence, completes research and prepares reports and responses, and maintains department records and files).

SUPPORT TO BUSINESS PARTNERS

- Coordinates activities with gift administration, gift planning, and accounting department as necessary.

BOARD SUPPORT

- Collaborates with the Board and Trustee Relations Manager to coordinate logistics and materials for meetings of directors and related committees to ensure that meeting attendees are sufficiently informed and prepared to participate in meetings.
- Supports the use of OnBoard and the board calendar.
- Assists in the preparation and tracking of minutes for all board and committee meetings and manages and updates board and committee workplans.
- Attends all meetings of the board and board committees and provides support to the Board and Trustee Relations Manager as needed.

CORPORATE COMPLIANCE, INCLUDING CHARITABLE SOLICITATION LAWS

- Monitors statutes and regulations, and files any corresponding state reports to ensure compliance related to employment, charitable solicitation, trust and annuity administration, and corporate activities.
- Provides Support to Vice President of People and Culture
- Processes payroll.
- Assists with the administration of the employee lifecycle: recruiting, onboarding, processing salary increases, and offboarding.

OTHER DUTIES

- Participates on committees and/or task forces as requested
- Assists with special projects as requested
- Performs other duties as assigned

COMPETENCIES

- Demonstrated ability to work within a diverse team and actively seek out opportunities to promote and cultivate diversity across the organization.
- Excellent written and verbal communication skills, including the ability to accurately and thoroughly communicate legal issues and concerns.
- Ability to communicate effectively with internal clients, University partners, donors and their representatives, outside counsel and other support staff.
- Highly organized, responsible and responsive, with project management skills to own and drive projects from start to finish, and strict adherence to deadlines.
- Ability to manage multiple projects with competing priorities and deadlines and completing assignments with a focused attention to detail.
- Self-sufficient, able to work independently and take initiative, but able and willing to ask for assistance and advice when needed.

EDUCATION AND EXPERIENCE

Required

- Minimum of three (3) years' experience as a paralegal and/or in combination with legal administration and office administration
- Proficient user of technology, particularly Microsoft Office Products, Microsoft Teams, Zoom, and Adobe Acrobat.

Preferred

- Bachelor's Degree preferred, or equivalent life, military and/or professional experience
- Experience with trusts and estates
- Paralegal certification
- Five (5) or more years as a paralegal and/or in combination with legal administration experience
- Experience with nonprofit organizations and/or higher education
- Valid notary license (or willingness to obtain one)
- Human resource administration experience

SOFTWARE AND EQUIPMENT UTILIZED

- Microsoft Office Products; Adobe Acrobat; Monday.com; Zoom;
- Salesforce/CU Ascend; OnBoard, fundraising software (PG Calc and donor relationship databases) and legal research tools.

WORKING ENVIRONMENT

- Hybrid schedule
- Work in an office environment requiring light physical effort by handling objects up to 20 pounds occasionally and/or up to 10 pounds frequently with or without accommodations
- Stationary at a desk for most of the day, working with standard office equipment (such as phone, copier/scanner, and personal computer) with or without accommodations.

This position is eligible for an incentive bonus, a full and competitive benefits package, which includes:

- Incentive pay: up to 10% bonus
- Medical: Three plan options
- Dental: One plan option, 100% employer paid
- Vision: One plan option, 100% employer paid
- Health Savings Account: Employer contributes up to \$2,300 annually
- Additional benefits: Disability, Life, Dependent/Health Flexible Spending Accounts
- Retirement 401(k) Plan: Employer contributes up to 6% of your annual compensation, per plan terms
- Paid Time Off:
 - o Paid Time Off: 25 (first two years)
 - o Holidays: 12 days
- Lifestyle Spending Account: Up to \$1200 per year for reimbursements towards wellness programs
- Free underground garage parking
- Public Service Loan Forgiveness plan support
- Tuition reimbursement, 529 Savings Plan, Employee Assistance Program
- Professional Development Opportunities

WORKPLACE

Across our team, we value exceptional customer service, integrity, innovation, embracing our fiduciary responsibilities, and a welcoming and inclusive environment. Ideal candidates will operate well in a collaborative team environment while also completing work independently.

We work in an office environment in a secured building with a mini on-site gym, secure indoor garage parking, with convenient access to uptown and downtown Denver and operate on a hybrid model where staff have the option to work in-office and remotely several days per week.