



## **Director of Information and Quality Control**

O'Donnell Law Center is a growing boutique law firm located in Osage Beach, Mo. We are dedicated to providing the highest quality Estate Planning Services to our clients. While we are an extremely busy office, we enjoy a relaxed and warm atmosphere which sets us apart from the larger firms.

We are looking for someone who is smart, motivated, has the ability to work under pressure and the desire to contribute to the success of the practice and the experience of our clients. This person will join our firm as the Director of Information and Quality Control.

The successful candidate will have exceptional interpersonal skills, and the ability to interact skillfully and courteously with a variety of individuals. They will also possess excellent organizational skills, the ability to think and communicate logically, and the ability to work independently and make sound judgements. Because we prepare real estate deeds for estate planning purposes, experience with real estate deed searches, deed acquisition, and deed preparation is helpful.

**If this sounds like you, please submit your resume and a cover letter to Sue at Kmet HR Consulting, [sue@kmetconsulting.com](mailto:sue@kmetconsulting.com).**

### **JOB PURPOSE:**

The Director of Information and Quality Control will be directly involved in processing all client data and information in both traditional documents and digital formats.

This position will work closely with and have a high level of communication with the attorney, paralegals, clients, and other team members and will work to ensure we provide the highest quality products and services to the clients of the O'Donnell Law Center.

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### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Review client information and work with clients to obtain any missing, incomplete, or unclear information or documents to include the information necessary for trusts, wills, power of attorney, deeds and health care documents.
- Design, organize and upload client information to data platforms.
- Manage all aspects of deed acquisition and preparation for estate planning purposes to include researching, obtaining, troubleshooting, and recording.
- Conduct due diligence, quality assurance and follow through on all aspects of information needed for the estate planning documents.
- Work closely with colleagues to ensure all information is accurate, complete, and available as needed.

- Prepares and updates attorney notebooks before and after each Family Wealth Planning session.
- Transcribe attorney edits into client documents.
- Proofing initial drafts for attorney review.
- Coordinate all phases of document preparation with drafting department.
- Manage all aspects of client Estate Planning Portfolio fulfillment.
- Provide on-going support to clients as needed.
- Participate in all office meetings, training, and education.

## **ADDITIONAL DUTIES AND RESPONSIBILITIES**

- Act as a witness to document signings.
- Prepare signed documents for final portfolio binding.
- Remain current on the latest improvements in hardware and software that would be beneficial to the Firm.
- Performs any other related duties as assigned.

## **QUALIFICATIONS**

- BA/BS degree preferred or any combination of experience and training which provides the necessary knowledge, skills, and abilities.
- Ability to identify and analyze complex issues and problems, and recommend and implement solutions.
- Thorough knowledge of office administration functions and responsibilities.
- Exceptional interpersonal skills; able to interact skillfully and courteously with co-workers, attorneys, clients, and the public.
- Strong written and verbal communications.
- Demonstrated history of coordinating and completing multiple tasks on time.
- Must have strong computer skills with proficiency in Microsoft Office 365 and the ability to master new software programs.
- Work occasionally requires a high level of mental effort and flexibility. Must be able to perform the duties of the position with time constraints and interruptions while under pressure.
- Ability to handle difficult situations and multiple important deadlines and schedules.
- Must possess excellent organizational skills.
- Ability to think and communicate logically.
- Ability to follow and provide written, verbal, and diagrammatic instructions.
- Ability to appropriately address issues involving confidential information.
- Considerable knowledge of mobile, digital and conventional office procedures and practices; ability to operate computer hardware and software in an efficient and effective manner.
- Ability to work independently and make sound decisions.

O'Donnell Law Center offers a comfortable work environment, business casual dress and a total compensation package that includes a competitive salary and generous paid time off.

O'Donnell Law Center is an Equal Opportunity Employer. Our success depends heavily on the effective utilization of qualified people, regardless of their race, ancestry, religion, color, sex, age, national origin, sexual orientation, gender identity and/or expression, disability, veteran's status, or any characteristic protected by law. As a firm, we adhere to and promote equal employment opportunity for all.