

Estate/Trust Attorney

Our Company: Talley & Company is a full service tax, accounting, and auditing firm located in Orange, CA. We work specifically with high net worth clients and their closely held entities, professional athletes, as well as distribution, wholesale and the health care industry. One of the added value services we provide our clients is to address the legal processes associated with tax planning needs. This is done through Talley Law Group, an affiliation of Talley & Company CPAs. Talley Law Group focuses on entity formation, management and dissolution, tax representation, and estate planning.

The Position: We are currently seeking an estate/trust attorney to help clients minimize estate and gift taxes as well as to assist in transferring property to heirs. This individual will draft documents such as trusts, wills, funding documents, healthcare directives and power of attorney forms.

Our Staff: We believe in constantly providing our staff with the personal and professional development that is needed to thrive in the field of public accounting. As Talley & Company strives to grow an astounding 15% this year, fostering a group of highly motivated professionals who are able to properly serve our clients is one of the keys to making our goal possible. If you want to work in a dynamic, exuberant, and entrepreneurial laden environment, Talley & Company is the right place for you.

Qualifications:

- 3-6 years of experience
- Corporate probate and estate experience necessary
- Practical experience in drafting estate docs (i.e. disposition of estate to children and following generations)
- Solid understanding of typical trust provisions with a keen knowledge of the changes in estate tax law
- Hands-on skill in trust administration and probate, including: appropriation notices, court requirements, and property requirements
- Probate litigation helpful but not required; CPA helpful but not required

Duties:

- Drafting estate plans, business documents
- Buy/Sell Contracts
- Corporate governance

Salary: DOE; Please send resume along with salary requirements to careers@talleync.com