



Crane Law, PC

Your Estate Matters

Job Title: Estate and Trust Administration Paralegal
Company: Crane Law, PC
Location: Bloomsburg, Pennsylvania
Position Type: Full-Time
Schedule: Monday – Friday, 8:30 AM – 4:30 PM

Position Summary

Crane Law, PC is seeking an experienced Estate and Trust Administration Paralegal to support Pennsylvania estate and trust matters from initial intake and probate through tax filings, accountings, distributions, and final closing.

Working under attorney supervision, the paralegal will manage assigned matters, maintain organized electronic files, monitor deadlines, prepare probate and tax-related documents, maintain financial records, and assist fiduciaries with their administrative responsibilities.

A thorough understanding of probate and non-probate assets is essential. The successful candidate must be able to review asset ownership, titling, beneficiary designations, and related records and understand how those factors affect estate administration and Pennsylvania inheritance-tax reporting.

This client-facing position requires technical accuracy, sound judgment, compassion, and strong follow-through. Hands-on Pennsylvania estate administration experience is required. Experience with Lackner 6-in-1, InheriTax, and Clio is strongly preferred.

Essential Responsibilities

File Management

- Open and manage estate and trust matters in Clio from initial intake through final closing.
- Maintain current tasks, deadlines, contacts, communications, matter notes, and status information.
- Maintain complete and consistently organized electronic files using the firm's document-naming and file-management procedures.

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- Support the firm's primarily paperless environment while safeguarding and tracking original documents and necessary physical records.
- Identify missing information, approaching deadlines, and unresolved issues and bring them to the supervising attorney's attention.

Probate and Asset Administration

- Prepare petitions for probate or grant of letters and related Register of Wills filings under attorney supervision.
- Obtain death certificates, original testamentary documents, short certificates, fiduciary appointments, and other initial estate documents.
- Prepare and send required notices to beneficiaries, interested parties, and government agencies and maintain proof of service or filing.
- Prepare notices for legal advertisement, coordinate publication with approved newspapers or legal journals, and retain proof of publication.
- Apply for the estate's Employer Identification Number and assist the fiduciary with opening an estate bank account.
- Coordinate and document safe-deposit box access and inventories when applicable.
- Identify and document probate and non-probate assets by reviewing wills, trusts, deeds, beneficiary designations, account statements, and ownership records.
- Work with fiduciaries, financial institutions, insurance companies, retirement-plan administrators, and other custodians to identify, collect, value, safeguard, transfer, and distribute assets.
- Obtain date-of-death balances and coordinate appraisals and valuations for real estate, business interests, personal property, and other assets.
- Organize information concerning debts, administration expenses, liens, and creditor claims and assist with their review, documentation, and payment.

Real Estate Administration

- Coordinate estate real estate sales with fiduciaries, real estate agents, appraisers, buyers, lenders, title companies, and settlement professionals.
- Track agreements, contingencies, closing requirements, settlement dates, expenses, and sale proceeds.
- Coordinate the collection, monitoring, documentation, and authorized release of escrowed funds relating to estate real estate transactions.



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Tax Returns and Financial Records

- Prepare Pennsylvania Inheritance Tax Returns, including Forms REV-1500 and REV-1502, supporting schedules, supplemental filings, and related documentation under attorney supervision.
- Enter and maintain estate and trust information in Lackner 6-in-1 and InheriTax.
- Gather Forms 1099, income records, expenses, and other information for the estate's accountant to prepare the decedent's final Form 1040 and any required Form 1041.
- Assist the attorney and estate accountant with the preparation of federal estate tax returns, including Form 706, when applicable.
- Maintain and reconcile estate and trust receipts, disbursements, expenses, reimbursements, reserves, escrow activity, and distributions.

Accountings and Distributions

- Prepare formal or informal estate and trust accountings and reconcile them to supporting financial records.
- Prepare distribution schedules, receipts and releases, family settlement agreements, and other closing documents under attorney supervision.
- Coordinate interim and final distributions after legal, tax, creditor, real estate, and reserve requirements have been addressed.
- Support ongoing and post-death trust administration, including recordkeeping, accountings, tax coordination, beneficiary communications, and distributions.
- Complete final correspondence, file review, and closing procedures.

Required Qualifications and Skills

- Education: High school diploma or equivalent.
- Experience: Minimum of 2 years of experience in Pennsylvania estate or trust administration in a law firm, accounting firm, bank trust department, or comparable professional environment.
- Thorough understanding of probate and non-probate assets.
- Working knowledge of Pennsylvania probate procedures, inventories, inheritance tax returns, creditor matters, accountings, distributions, and estate closing.
- Ability to understand how asset ownership, titling, beneficiary relationships, and real estate interests affect estate administration and inheritance-tax reporting.
- Strong numerical, organizational, written, and verbal communication skills.

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- Ability to manage multiple matters and competing deadlines with accuracy, discretion, and consistent follow-through.
- Proficiency with Microsoft Word, Excel, and Outlook.
- Ability to learn and effectively use Clio and other legal, tax, accounting, and document-management technology.

Preferred Qualifications

- Education: An associate degree or relevant postsecondary certificate in Paralegal Studies, Legal Studies, Accounting, Finance, Business Administration, or a related field. Comparable industry training and directly related experience will also be considered.
- Licensure: Active Pennsylvania Notary Public commission
- Experience with Lackner 6-in-1 Estate and Trust Administration software and InheriTax.
- Experience with Clio or another legal case-management platform.
- Experience preparing Pennsylvania inheritance tax returns and estate or trust accountings.
- Familiarity with Pennsylvania Registers of Wills, Orphans' Court practice, and county-specific procedures.

What Success Looks Like

- Matters progress steadily from opening through closing.
- Probate filings, inheritance tax returns, accountings, real estate transactions, and distributions are completed accurately and on time for attorney review.
- Probate and non-probate assets are correctly identified, documented, and addressed.
- Electronic files are complete, consistently organized, properly named, and easy for the team to review.
- Financial, escrow, real estate, and distribution records reconcile to supporting documentation.
- Potential issues are identified early and escalated appropriately.
- Clients and fiduciaries receive clear, compassionate, and timely communication.

Ideal Candidate

- Detail-oriented, dependable, and takes pride in high quality work.
- A team player with a positive and professional attitude.
- Comfortable managing multiple priorities in a fast-paced environment.

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- Committed to excellent client service.
- Maintains the highest standards of integrity and confidentiality.

Professional Development and Career Growth

Crane Law, PC supports continued education, professional development, increased responsibility, career growth, and professional networking. Employees are encouraged to pursue opportunities that strengthen their knowledge of estate and trust administration, inheritance taxation, fiduciary accounting, real estate matters, legal technology, file management, and client service.

Compensation and Benefits

- Compensation commensurate with experience and qualifications.
- A relocation stipend may be available for an exceptional candidate.
- Annual \$500 bonus for employees who maintain an active Pennsylvania Notary Public commission and perform notarial services as part of their employment.
- Employer-sponsored employee health, dental, and vision insurance. Employer-sponsored dependent or family coverage is not currently offered.
- Paid time off and paid holidays.
- Professional development, continuing education, career growth, and professional networking opportunities.

About Crane Law, PC

Crane Law, PC is a Pennsylvania law firm serving individuals and families in estate planning, estate and trust administration, elder law, and related matters. Our work combines careful legal guidance with responsive and compassionate service during important and often difficult life transitions.

Crane Law, PC is affiliated with Crane Settlement Services, LLC, a Pennsylvania real estate title and settlement company under common ownership. The organizations provide distinct legal and settlement services while sharing a commitment to accuracy, communication, and client-focused support.

How to Apply

Qualified candidates are invited to submit a resume by email to brian@cranelawpc.com.

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Please include "Estate Administration Paralegal" in the subject line.

Applications and resumes will be accepted electronically. Please do not visit the office to submit a resume or application in person. Candidates selected for further consideration will be contacted directly to arrange the next steps in the hiring process.

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