TASKS MENU

Attorney & Law Firms

Law firms have requested the tasks detail next.

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TASKS MENU

Attorney & Law Firms

Attorney & Law Firms have requested the following detailed tasks:

Page

Legal & Administrative Tasks

Welcome new leads and clients by phone or email; answering or directing inquiries.

Manage attorney's calendar, plan and schedule conferences, dispositions.

Produce information by transcribing, formatting, and inputting data to support case preparation.

Support in recording and monitoring court appearance dates, pleadings, & filing requirements.

Prepare invoices and track payments, manage expense reports and assist in travel reservations.

Save attorney's time by reading, researching, reviewing, verifying, and routing correspondence.

Monitor evidence-gathering; anticipate changes in litigation or transactional preparation requirements.

Explore opportunities to add value to the firm and job accomplishments.

Organize, prepare reports & legal documents, record meetings, maintain transcripts & evidence.

Maintain client's confidence by keeping client/attorney information confidential.

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General Admin Tasks

- Help with filing mail that was received on paper and scanned.
- Help with email-related items.
- Write short articles about clients' stories/cases or legal related topics.
- Prepare office reports.
- Organize Files, Draft Contracts, Create Presentations.
- Improve and organize the documents library, which includes a variety of legal documents, questionnaires, templates, etc..
- Manage online documents, including editing/labeling documents correctly as needed, and/or changing document names.
- Keep referrals and partners up-to-date regarding to what happened to their referred clients.
- Help the law firm develop, create and document company's SOPs (standard operating procedures).

Client Communication, Support & Follow-ups

03

Answering the Phone & Taking Messages.

Receive the phone calls and the messages through the system.

Answer the texts and group chat messages.

Qualifying calls.

Answer simple questions if a client calls and asks for an update about a case, court dates, etc..

If the client asks a law-related question, take a message and/or forward the question to the right paralegal or attorney.

Follow up with clients to make sure the law firm has all the necessary documents, info, and details they need to build their case and submit it to court.

When clients need to make payments, the VA would need to make sure clients pay their bills.

Write monthly letters to clients with a general update on their case - Take credit card payments over the phone.

Gather Customer Testimonies & Stories (Affidavit).

Prepare Case Indexes.

General Research & Contact Government Agencies.

Calendar Management & Appointment Setting

04

Help the law firm's staff and/or CEO manage his calendar appropriately.

Schedule appointments with clients, and/or clients with other staff using the calendar, as necessary.

Save the appointments into Google Calendar, or any other calendar management system.

Translations 05

Documents translation from English to Spanish.

Translations for birth certificates and other documents.

Client's conversations or declarations translation from English to Spanish.

Follow-up With Clients 06

Follow up with clients to make sure the law firm has all the necessary documents, info and details they need to build their case and submit it to court.

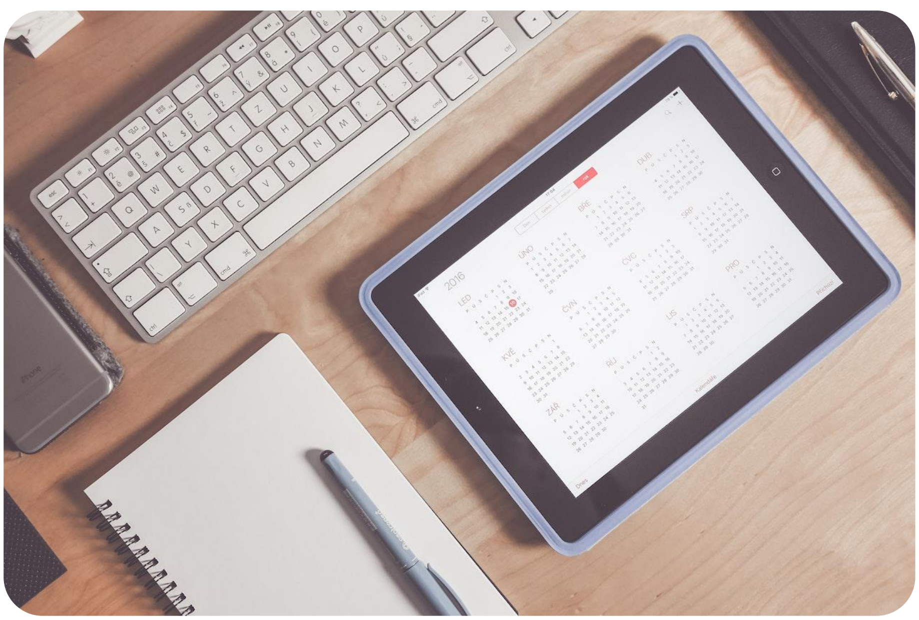
Follow up over the phone, text message, email, Whatsapp or whatever is necessary to get the info they need from each client. This may include booking calls and/or appointments with clients, adding them to a calendar AND then again following up to make clients shows up.

Review & Check Client Information

Review all documents and info submitted by clients through the online form they initially complete.

Make sure that clients provide an electronic signature, to hire the law firm for their services.

Connect with the clients over the phone, email, and/or Zoom (video call) to review information.



Gather and review various documents, and organize them as needed for each client's case.

Accounting & bookkeeping services

Tax preparation and filing.

Invoicing and Billing.

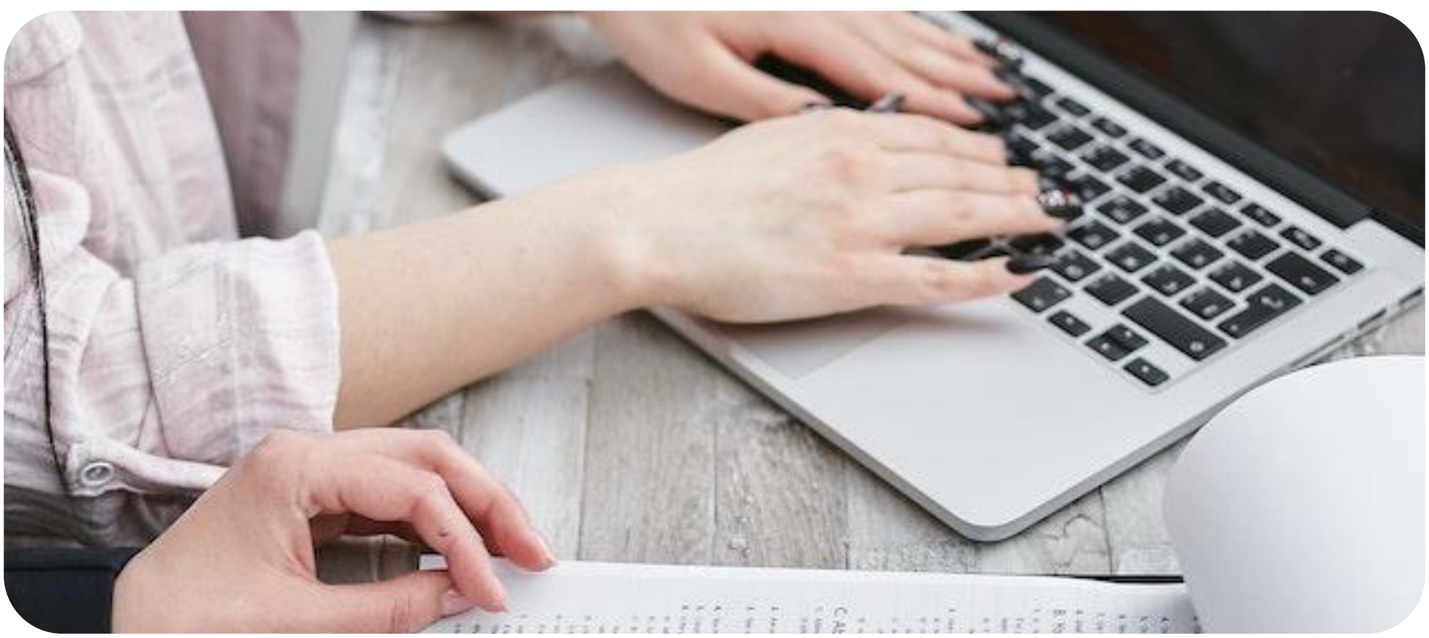
Manage your accounts receivable, accounts payable, general ledger, and payroll..

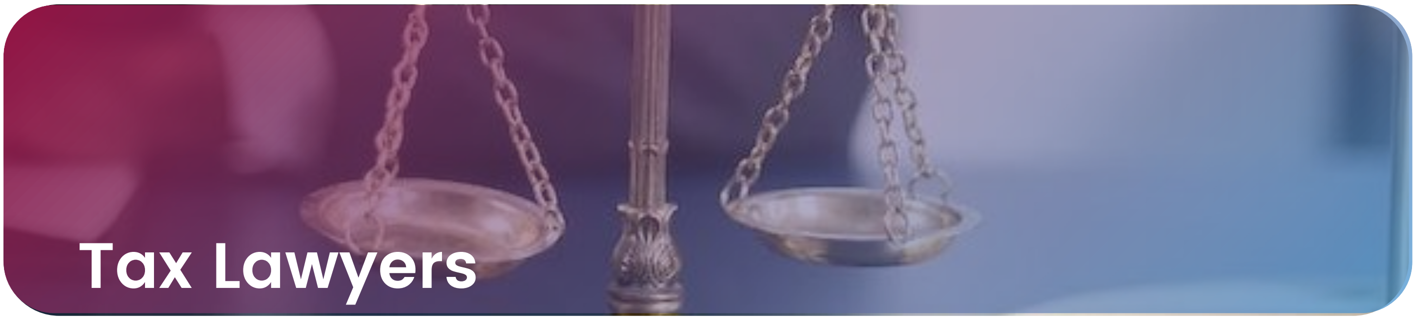
Set up charts of accounts, reconcile bank accounts and credit card statements and prepare financial reports..

Digital Marketing Tasks

09

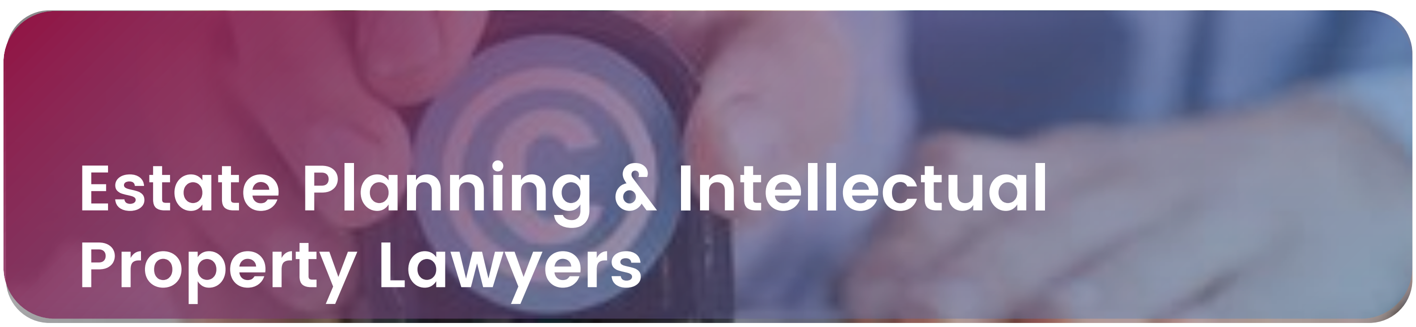
- Social media management, listen and respond messages.
- Research new topics to write about on your blog.
- Research social media activity and accounts for potential business.
- Contact lawyers' blogs to look for guest blog opportunities.
- Collect reviews, feedback or testimonials from clients.
- Research and evaluate digital marketing tools, software, agencies and trending solutions.
- Email marketing newsletter design, setup and collect leads from various sources and save them the system.
- Create, manage and/or optimize your Google ADs, Facebook ADs, or promoted listings.
- Post new content on your website's blog.
- Design simple graphics for your website, social media channels, etc..





Tax Lawyers

1. Research local and state rules, statutes and orders.
2. Prepare petitions and supporting evidence to present and file.
3. Obtain information and file necessary documentation to qualify entities to transact business in foreign states.
4. Maintain tickler systems for annual meetings and draft documents for such meetings, including Notices, Waivers, Stockholders' and Directors' meeting minutes, written consents in lieu of meetings, etc.
5. Research on state websites for name availability and entity information and corporate name reservation.
6. Prepare and file formation documents, entity name changes and dissolution.
7. Help tax attorneys to prepare and maintain closing checklists for real estate, corporate and finance transactions.
8. Coordinate document execution and mechanics for closing real estate, corporate and finance transactions..



Estate Planning & Intellectual Property Lawyers

1. Secure documents related to estate planning.
2. Assist in valuing the assets of the estate.
3. Draft estate documents for attorney's review.
4. File life insurance claims and other death benefits
5. Prepare probate documents (petitions, motions, testamentary letters, inventories, accountings, and notices).
6. Contact beneficiaries and next of kin regarding will and other probate hearings.
7. Administer estate accounts and assist with the liquidation and transfer of property.
8. Prepare and file the decedent's final income and tax returns.
9. Participate in the administration of guardianships and trusts.
10. Assist intellectual property attorneys with name changes and adoption proceedings.

SPECIALTIES

Corporate Lawyers

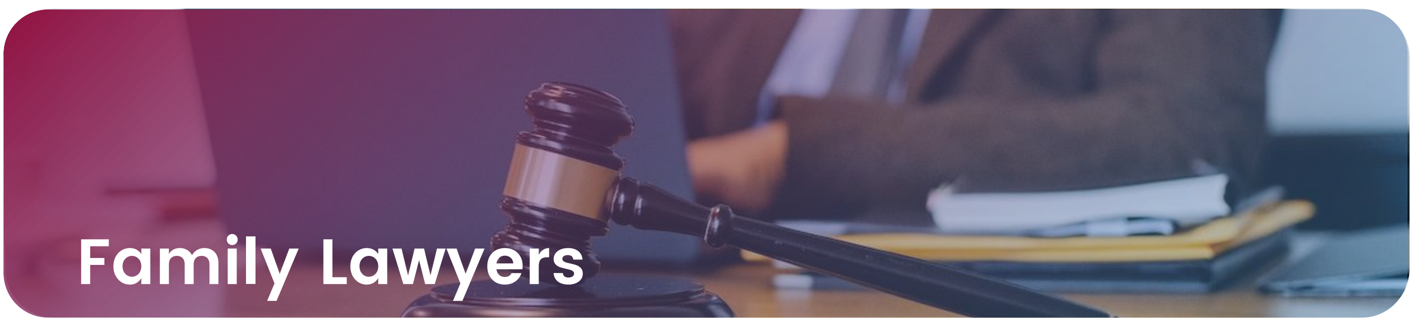
1. Assist the general counsel and work with the contract team in preparing and reviewing contracts.
2. Draft and review technology-related contracts including software license, maintenance and support, professional services, non-disclosure and other agreements.
3. Work directly with clients and client's counsel as needed about contractual negotiations.
4. Keep up to date with laws and regulations relevant to the industry.
5. Maintain a computerized contract activity log.
6. Respond to general legal requests, referring to General Counsel as needed.
7. Perform tasks related to the company's corporate structure, including maintaining corporate books, drafting board and shareholder resolutions, liaise with the company's tax and corporate advisors as needed.
8. Manage corporate attorney's agenda, schedule appointments and confirm attendance

Criminal, Civil & Personal Injury Lawyers

1. New client intake screening.
2. Organize client conferences, and civil attorney's meetings.
3. Schedule meeting with expert witnesses, and other special functions.
4. Coordinate preparation of charts, graphs, and other courtroom visuals.
5. Maintain criminal attorney's calendar.
6. Follow-up on delegated assignments.
7. Generate revenue by documenting and inputting attorney's billable time.
8. Maintain client's confidence by keeping client/attorney information confidential.
9. Perform incident research and data collection for personal injury attorneys.

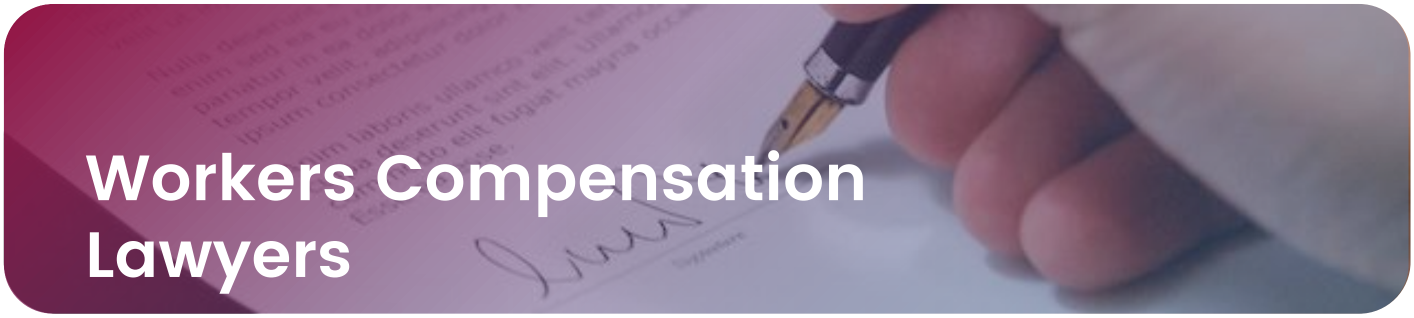
Bankruptcy Lawyers

1. Run and review court dockets.
2. Identify issues in bankruptcy processes and expedite resolution.
3. Prepare pleadings, motions, affidavits, etc.
4. Document execution and creation from third-party services.
5. Daily communication with clients in a professional manner.
6. Assist bankruptcy attorney in all aspects and areas of a nationwide practice as needed.
7. Build and maintain positive relationships with clients, opposing counsel, court clerks, etc.



Family Lawyers

1. Prepare and draft motions, pleadings, judgments, statements, documents, and other correspondence (e.g., debt and asset lists, witness affidavits, child support worksheets, responsive pleadings, etc.)
2. Perform legal research.
3. Serve as a liaison between the client and the attorney, conduct client interviews.
4. Prepare trial notebooks and aid in trial settings.
5. Prepare and review discovery packages, including disclosure statements, answers to interrogatories, and production requests.
6. Organize and track case status and manage attorney's calendar for court appearances and motions.
7. Complete intakes and interviews with clients and provide friendly customer service.



Workers Compensation Lawyers

1. Prepare and file (both electronic and manual) pleadings, motions/oppositions and discovery.
2. Review email and document production
3. Prepare correspondence and maintain electronic legal files.
4. Direct interaction with clients, opposing counsel, home office, claim partners and court employees
5. Prepare applications; petitions; DORs (including e-filing on EAMS).
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General Admin Tasks

1. Help with filing mail that was received on paper and scanned. The mail has to be filed into the correct digital client folder. May involve using Dropbox, Google Drive, etc.
2. Help with email-related items..
3. Write short articles about clients' stories/cases or legal-related topics.
4. Prepare office reports.
5. Documents translated from Spanish to English as needed..
6. Improve and organize the documents library, which includes a variety of legal documents, questionnaires, templates, etc.
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8. Keep referrals and partners up-to-date regarding what happened to their referred clients.
9. Help the law firm develop, create, and document the company's SOPs (standard operating procedures).
10. Schedule appointments with clients by using the calendar, as necessary..
11. Save the appointments into Google Calendar, or any other calendar management system.

Client Communication, Support & Follow-ups

1. Take notes and info from each client case and save it into the web-based system she has which is Docket wise.
2. The VA will follow up with potential clients that come through the website or by phone and ask what they are looking for and if the attorney can help them..
3. Answer simple questions if a client calls and asks for an update about a case, court dates, etc.
4. If the client asks a law-related question, take a message and/or forward the question to the right paralegal or attorney.
5. Follow up with clients to make sure the law firm has all the necessary documents, info, and details they need to build their case and submit it to court.
6. When clients need to make payments, the VA would need to make sure clients pay their bills.
7. Write monthly letters to clients with a general update on their case.
8. Write monthly letters to clients with a general update on their case.

Fill Out Forms & Questionnaires

1. Fill out multiple forms and put them together in a folder.
2. Prepare the pre-filled PDF forms with the client's information, after gathering info and facts.
3. Attach and create the exhibits for each client, ensuring that all items are there.
4. Send forms and exhibits to the lawyer for a final review.

General Admin Tasks

1. Review all documents and info submitted by clients through the online form they initially complete.
2. Make sure that clients provide an electronic signature, in order to hire the law firm for their services.
3. Connect with clients over the phone, email, and/or Zoom (video call) to review information.
4. Gather and review various documents and organize them as needed for each client's case.

Gathering Client's Info & Obtaining Documents

1. Gather information from customers over the phone and email.
2. Once the lead becomes a client, they have portal access and documents needed to complete their application. The VA will be required to review if all those documents are there or not and follow up on them.
3. Enter all the information into the proper case management system or CRM.

Book A Call

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