



**JOB TITLE:** Legal Service Specialist

**DEPARTMENT:** 3CE

**REPORTS TO:** Client Services Manager

**FLSA STATUS:** Non-Exempt

**SCHEDULE:** Full-Time, M-F, 7:00 am to 4:00 pm PST, Overtime with Notice

**LOCATION:** Santa Fe Springs, CA

### **ABOUT FIRST CORPORATE SOLUTIONS**

First Corporate Solutions (FCS) is a global risk management and due diligence firm providing UCC and corporate solutions that help legal and financial professionals mitigate risk and perfect secured transactions. As a longtime leader in web-based due diligence solutions, FCS offers products and services across many diverse segments of the public records industry.

### **JOB SUMMARY**

The Legal Service Specialist provides support to the Legal Services team. This team specializes in incorporation and legal business compliance solutions. This role assists with Registered Agent duties and compliance and learns to proactively manage the entire order process (from creation through invoice and follow-up), probes for cross-selling opportunities, and develops positive working relationships with customers and strategic partners nationwide. The Legal Services Specialist plays a vital role in supporting, communicating and encouraging FCS' Vision, Mission and Guiding Principles.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

Manage existing client accounts and work in tandem with the sales representatives with on-boarding new client accounts. Includes account set-up, maintenance communications, responding to customer inquiries and issues, billing/invoicing customers, and initiating the renewal process. Represents FCS by developing and maintaining comprehensive knowledge of FCS solutions, industry trends and general business acumen through various sources.

#### **Vendor Relationship Management**

- Support the Registered Agent and Service of Process (SOP) product lines, clients, Service Consultants, Annuity Based Services, and the Legal Services Divisions in all aspects of growth.

- Appear in court if needed, or as allowed by state law, on behalf of FCS as it relates to bench warrants, or FCS being wrongly named in suits.
- Train, educate, and develop processes and procedures as they relate to the division's needs.
- Manage the RA Resignation process.
- Manage projects, in part or in full, for:
  - Change of Agent.
  - Annual Report Management.
  - Yearly records updates to obtain officers and directors per states like DE.
  - Updates for officers and directors for states like NV and WY.
  - SOS Web-listings and Commercial Registered Agent Licensing.
  - SOS Annual/Biannual Reports, Business Licenses, and Tax Returns.
- Develop resources and tools needed.
- Audit accounts so that they are under FCS in each state.
- Participate in the development of blogs, emails, or other means of marketing.
- Review and audit appointment, date, and volumes as it relates to managing RA units.
- Support the needs of the Legal Services Division Manager, and other division managers, when not immediately available or out of the office.
- Participate in the daily oversight and workload of LSD staff and yearly performance review contribution.
- SOP RA Address and SOS Corporate Vendors.
- Participate with annual, or semi-annual, vendor audits of servicing abilities and rate negotiation.
- Communicate RA office address moves.
- Wholesale RA daily contacts with some high-level contacts as it relates to corporate and RA services.
- Invoice auditing and approval for RA Address and other service invoices as needed.
- Manage the collections process with other managers as it relates to RA Invoices.
- Maintain proper documentation.

### **Client Management**

- Assist with client visits and training.
- Ensure the highest level of both service and client satisfaction across all product line offerings to retain, satisfy and fulfill the needs of the FCS Customer.
- Anticipate client's needs as changes are made or learned.
- Participate in the ongoing improvement of the client experience and division.

### **Contact with Sales and Management**

- Maintain reciprocal partnerships with sales and other departments.
- Identify and forward new business opportunities.

- Resolve client issues and know when to communicate or involve sales in client issues.
- Document, follow up, or assign leads.
- Participate with managers when outside counsel is retained.

#### **Other**

- General industry/company information
- Actively participate in the growth and development of FCS.
- Participate in drafting, proofing, or revising operating procedures or other documentation relating to consistency and best practices.
- Serve as back up staff as needed.
- Maintain industry knowledge with changes through interactions/websites, associations, and competition

#### **NON-ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Proactively pursue professional development activities (e.g., reviewing professional publications, establishing personal networks, continuous industry training and updates).
- Perform various other job-related duties as prescribed by company and departmental need.
- Cross train with team and other departments.
- Serve as departmental coverage as needed AND other duties as directed by Manager.
- Assist Manager with special projects and reports.

#### **REQUIRED QUALIFICATIONS**

\*Includes Physical and Mental Requirements\*

#### **Education**

- Minimum Education: High School Diploma.

#### **Experience**

- 2 years of customer service experience in any capacity.
- At least 2 years' experience working in a deadline driven environment with concentration on quality.

#### **Knowledge, Skills and Abilities**

- Basic understanding of legal industry pertaining to Business Entity formations and Registered Agent

- Type 45 words per minute with 100% accuracy.
- Ability to quickly learn and navigate propriety systems.
- High competence of computer applications including full Microsoft Suite and internet searching.
- Competent in PDF Studio Pro, Adobe Acrobat and a paperless work environment.
- Strong communication skills with reading, writing, speaking and command of the English language.
- Critical thinking with analytical and research skills.
- Capable of successfully collaborating with peers and management.
- Detailed, organized, time management, and multi-tasking skills.
- Integrate information from multiple sources quickly and accurately
- Ability to operate and navigate on a computer without supervision.
- Work effectively in a teamwork environment, in daily activities as well as address problems in unique situations.
- Online research skills.
- Possess fundamental mathematic skills.
- Demonstrated commitment to high professional ethical standards in a diverse workplace.
- Ability to apply principles of logical or scientific thinking to define problems, collect data, establish facts and draw conclusions.
- Ability to prepare business letters, proposals, summaries and reports using prescribed format and conforming to all rules of punctuation, grammar, diction, and style.
- Ability to continuously sit, stand or walk in an office environment.
- Ability to bend and lift up to 10 pounds.
- Average/ordinary visual acuity necessary to prepare or inspect documents or products and operate a computer.
- Able to hear average or normal conversations and receive ordinary information.

## **PREFERRED QUALIFICATIONS**

### **Education**

- Some college or bachelor's degree in business-related field.

### **Experience**

- Prior experience in risk management, compliance, UCC, public record, finance or legal industry.
- Legal or financial services experience is a plus.

## **WORKING CONDITIONS**

The worker is to work indoors and is not substantially exposed to adverse environmental conditions. Repetitive and continual typing motion is required.

May require occasional travel out of town by airplane or car to other cities for training, no more than 4 times a year.

**First Corporate Solutions is an EOE and offers a competitive benefits package. Salary is DOE. To be considered for this position please submit your resume and cover letter summarizing your experience to [careers@ficoso.com](mailto:careers@ficoso.com). Thank you for your interest!**

**RECEIPT AND ACKNOWLEDGEMENT**

I acknowledge and understand that:

- Receipt of the job description does not imply nor create a promise of employment, employment contract of any kind, or violate at-will employment.
- The job description provides a general summary of the position in which I am employed. The contents of this job description are job requirements, and, at this time, I know of no limitations which would prevent me from performing these functions with or without accommodation.
- I further understand that it is my responsibility to inform my supervisor at any time that I am unable to perform these functions.
- Job duties, tasks, work hours and work requirements may be changed at any time.
- Acceptable job performance includes completion of the job responsibilities as well as compliance with the policies, procedures, rules and regulations of First Corporate Solutions, Inc.

I have read and understand this job description.

**Print Employee Name:** \_\_\_\_\_

**Employee Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_