**JODI A. LOY**

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(805) 466-1725

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Twenty-five years of experience as a Legal Assistant / Paralegal with excellent office management, administrative and client relations skills seeking a position where a working knowledge of legal terminology,  general law and legal proceedings to the following case types will be fully utilized:

Estate Planning: Trusts and Wills – Probate of Estate -- Conservatorships  
and Guardianships – Adoptions  
          
  
**QUALIFICATIONS**

⋅ Detail-oriented                ⋅ High level of confidentiality

⋅ Proven ability to work independently       ⋅ Ability to work well within a team

⋅ Strong organizational skills ⋅ Proficiency in legal computer applications

⋅ Interact and relate well with a diverse clientele

**PROFESSIONAL EXPERIENCE**

**Legal Assistant / Paralegal 1987 to 1989**

**Robert H. Mott, Attorney at Law – San Luis Obispo, California 1993 to 2012**

Provided exceptional legal assistance and support to a sole, general practitioner in the areas of:

* *Estate planning* – provided expert preparation of trusts, wills, supporting documents; created and effectively implemented use of client trust notebooks. Prepared documents after death of Trustee including Notice to Beneficiaries, Death of Real Property Owner, Affidavit of Trustee and obtaining of EIN from the IRS. Efficiently obtained real property information, assessor information, deeds and legal descriptions through online search, county assessors and title companies.
* *Probate of Estates* – prepared all documents from opening the case through distribution of estate; timely arranged for publication of notices, service and filing with the court of documents; calendared of key dates and effectively communicated the same to clients.
* *Guardianships and* *Conservatorships -* worked closely with clients in preparation of initial documents to open cases; timely arranged for service of document and filing the same with the court; accurately prepared accountings as required; calendared key dates and maintained contact with clients to help them through the process.
* Adoptions – solely responsible for all adoption cases handled by the office. Provided clients with detailed information about the adoption process. Maintained contact with clients, agency caseworkers, and court personnel. Prepared all documents including judicial council forms, and termination of parental rights pleadings with proficiency and accuracy.
* Provided excellent administrative and secretarial support to attorney in areas of business law; unlawful detainers and family law cases including drafting of correspondence, pleadings, declarations, leases, agreement and contracts.
* Performed computerized legal research via Lexis Nexis to obtain relevant case law, codes and statues.

**Legal Secretary/Receptionist 1992 to 1993**

**Patrick J. Perry, Attorney at Law**

**San Luis Obispo, California**

* Provided excellent daily support to sole practitioner and paralegal in the area of family law.
* Performed extensive client contact as the first contact at the office.
* Answered phones and effectively provided clients with information on their cases and upcoming court dates.
* Prepared simple to moderately complex legal documents including judicial council forms and pleadings and attorney’s direction.
* Prepared general correspondence, typing and proofreading documents with proficiency.
* Filed documents with the court meeting all deadlines.

**COMPUTER EXPERIENCE**

Computer and Software   Proficient in Word Perfect - Lexis Nexis - Legal Solutions

Experience with Word / Excel

      Comfortable with social media and internet for research

**EDUCATION AND TRAINING**

Paralegal Courses - Cal Poly San Luis Obispo 1993 to 1996

* Estate Planning; Civil Litigation; Contracts; Probate; Introduction to Paralegal; Legal Research; Torts
* Paralegal Certificate