

Client Concierge Specialist

Brierton, Jones & Jones, LLP

About Us

Brierton, Jones & Jones, LLP has provided San Diego County families with practical legal insights, attentive service, and compassion for over 30 years. We are one of the few firms in the county that focuses exclusively on trusts and estates, allowing our clients to benefit from deep subject matter expertise and decades of experience.

We are seeking a professional, organized, and compassionate Client Concierge Specialist to serve as the first point of contact for prospective clients and referral sources.

Position Overview

The Client Concierge Specialist manages the intake process from initial inquiry through onboarding of new clients. This position works closely with attorneys to coordinate consultations, conduct conflicts checks, communicate with prospective clients, and assist with client onboarding and matter setup.

The ideal candidate is polished, detail-oriented, responsive, and capable of communicating professionally with individuals navigating stressful or sensitive legal matters.

Primary Responsibilities

Intake & Client Communication

- Serve as the primary point of contact for prospective clients and referral sources
- Respond to incoming leads via phone, email, referrals, and website inquiries
- Conduct intake calls and/or introductory email communications
- Gather information necessary for conflicts checks and attorney review
- Obtain preliminary case information and summarize matters for attorneys
- Communicate consultation and representation fee structures to prospective clients
- Schedule attorney consultations and teleconferences
- Send consultation confirmations and appointment reminders
- Follow up with prospective clients regarding consultations and engagement status

Conflict Checks & Coordination

- Run and review conflicts checks
- Coordinate with attorneys regarding potential conflicts issues
- Provide conflicts information and intake summaries to attorneys prior to consultations

Client Onboarding

- Draft and transmit fee agreements and engagement documents
 - Obtain signed agreements and retainer payments
 - Coordinate attorney countersignatures
 - Circulate fully executed agreements to clients
 - Collect and organize client contact information and onboarding materials
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Matter Setup & Administrative Support

- Input client information into the firm's case management system
 - Open and create new matters
 - Assist with maintaining organized client files and intake records
 - Track referral sources and intake information
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Qualifications

- Prior law firm intake, receptionist, legal assistant, or administrative experience preferred
 - Excellent written and verbal communication skills
 - Strong organizational skills and attention to detail
 - Ability to communicate professionally and compassionately with clients
 - Ability to manage multiple tasks and deadlines in a fast-paced environment
 - Experience with legal case management software is a plus
 - Proficiency with Microsoft Office preferred
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Preferred Characteristics

- Professional and polished demeanor
 - Strong client service skills
 - Excellent follow-through and responsiveness
 - Ability to maintain confidentiality and discretion
 - Team-oriented with a positive attitude
 - Calm and organized under pressure
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Compensation & Benefits

- Compensation ranging from approximately \$46,000–\$50,000 annually, depending on experience and qualifications
 - Professional and collaborative work environment
 - Full medical and vision insurance coverage
 - 401(k) with employer matching
 - Paid holidays
 - Three weeks of paid vacation in addition to sick leave
 - Quarterly firm social events
 - Convenient San Diego office location
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To Apply

Please submit:

- Resume
- Brief cover letter
- References

We are seeking someone who is organized, client-centered, and excited to help provide exceptional service to prospective and existing clients of the firm.