

McCarthy Law, LLC
19 1st Avenue, East Greenwich, RI
401-541-5540

We are an established, small, but rapidly growing boutique law firm located in downtown East Greenwich, dedicated to providing comprehensive legal services to our clients in matters related to estate planning, elder law, elder care, probate, guardianship, and residential real estate transactions. Our team is committed to delivering personalized attention and tailored solutions to meet the unique needs of each client. We are a female-founded firm and are known in the area for our welcoming environment and compassionate approach.

We are seeking a motivated and results-driven Intake Coordinator to join our team. As an Intake Coordinator, you will be the first point of contact for potential clients, guiding them through the initial consultation process and assisting them in understanding our services. This role requires strong sales skills, as you will be responsible for effectively communicating the value of our legal services and converting leads into clients.

Responsibilities:

- Respond promptly and courteously to inquiries from potential clients via phone, email, and in-person meetings
- Coordinating client appointments and managing scheduling
- Conduct thorough intake assessments to understand the needs and objectives of potential clients
- Educate potential clients on the range of services offered by our firm, emphasizing the benefits and value proposition
- Build rapport and trust with potential clients to establish long-lasting relationships.
- Process payments through payment portal
- Maintain accurate records of all client interactions and follow-up activities
- Creating, organizing, and managing client files (Electronic and hard copies)
- Collaborate with attorneys and other team members to ensure seamless transition of clients into the firm
- Maintain accurate leads database in CRM
- Conduct follow up calls to clients who consulted but did not retain

Requirements:

- Must have a strong interest in our firm's practice areas
- Minimum of 2-3 years experience in sales and/or intake
- Proven sales experience in a related field, such as legal services, insurance, or financial planning
- Ability to network independently

- Desire to learn and grow, engage in personal development and contribute to firm growth
- Detail-oriented with strong organizational and time management skills
- Must be highly motivated and work well under pressure with minimal supervision
- Excellent communication, interpersonal, and client service skills
- Ability to work independently and collaboratively in a team environment
- Possess excellent problem-solving abilities
- Excellent public speaking skills
- Must be comfortable managing tasks and meeting deadlines with little supervision
- Lead with empathy and compassion, while maintaining professionalism

Benefits:

- Competitive salary commensurate with experience
- Bonus incentives based on performance and business development contributions
- Comprehensive benefits package including health insurance, life insurance, 401k with Safe Harbor match, and paid time off
- Opportunities for professional development and growth within the firm
- Supportive work environment with a collaborative team culture

The position is in-person at our East Greenwich, Rhode Island office. The hours are approximately 9:00AM-4:30PM Monday through Friday.

We offer a friendly work environment with a respect for work-life balance. In return, we expect our employees to be professional, hard-working, and kind individuals who take ownership of their role and their contribution to the overall success of the team and the firm.