

Coleman | Talley

Client Intake and Records Coordinator (Valdosta, GA)

Coleman Talley LLP is seeking a detail-oriented and dependable Client Intake and Records Coordinator to join our Valdosta, Georgia office. The Client Intake and Records Coordinator is responsible for overseeing the intake and lifecycle of client data, ensuring compliance with firm policies, maintaining the integrity of the case management systems, and supporting data hygiene. This role also assists the Firm Administrator with special projects and operational support tasks as needed.

Responsibilities include opening new files, initiating conflict checks, preparing engagement letters, coordinating and scheduling meetings, and performing a variety of administrative support tasks. The ideal candidate will possess strong communication skills, exceptional attention to detail, and the ability to follow instructions effectively. We are looking for a motivated self-starter who thrives in a collaborative team setting and can manage routine responsibilities and deadlines with consistency and accuracy.

If you are organized, proactive, and eager to contribute to a professional legal environment, we encourage you to apply.

Responsibilities:

- Primary point of contact for opening new matters to include addition of related parties and contacts.
- Review all new client/matter intake submissions for completeness and compliance with firm policies, e.g., engagement letter, conflict check, naming convention.
- Coordinate preliminary conflict checks.
- Assist with general administrative tasks.
- Maintain file naming conventions.
- Ensure timely and accurate file closure and archive processes.
- Monitor retention and secure storage of original paper records.
- Monitor compliance with the firm's records retention policies.
- Maintain organization and accuracy across legal management software, ShareFile, and shared network drives.
- Identify and correct inconsistencies in contact, matter, or document data.
- Coordinate with the Firm Administrator on improving and promoting case and document management best practices.

Qualifications:

- Some college coursework completed.
- Previous experience in a professional office setting is required.
- Strong organizational skills and attention to detail.
- Strong reading comprehension and ability to follow directions.
- Excellent written and verbal communication skills.
- Self-starter with the ability to work independently and as part of a team.
- Ability to handle multiple tasks and prioritize effectively.
- Skilled in organizing, scanning, and maintaining digital and physical files.
- Understanding of legal terminology, case intake, and records management procedures, a plus.
- Friendly and professional demeanor.

Technology:

- Proficiency in Microsoft Office software (Word, Outlook, Excel, PowerPoint)
- Proficiency in Adobe Pro and/or Kofax
- Understanding of online file collaboration sites such as ShareFile
- Experience with NetDocuments, Centerbase or similar LMS software, a plus.

Schedule: Part-time (Maximum of 29.75 hours/week)

Compensation: Commensurate with experience

How to Apply: Submit your resume, cover letter, and references to jobopportunity@colemantalley.com.