



JOB DESCRIPTION

Job Title: Legal Assistant
Department: Executive Team
Reports to: General Counsel
FLSA Status: Non-Exempt
Prepared By: Human Resources
Prepared Date: October 2, 2024
Management Approval: General Counsel

Summary: The Legal Assistant plays a vital role within the APM Legal Department and is responsible for the efficiency and effectiveness of APM's day-to-day legal operations. The Legal Assistant supports General Counsel by preparing and organizing legal documents and correspondences, conducting internal document searches and investigations, organizing and scheduling meetings, prioritizing legal projects, assisting in corporate governance and enhancing the overall productivity and quality of the legal work performed by the APM Legal Department.

Essential Duties & Responsibilities:

- **Document Preparation & Review:** Draft, review, and format legal documents, including legal correspondence and contracts.
- **Administrative Support:** Provide administrative support to APM's General Counsel, including managing calendars, scheduling meetings, coordinating travel, and preparing legal correspondence.
- **File Management:** Maintain and organize physical and electronic legal files for legal proceedings and internal matters, ensuring that all relevant information is properly collected and maintained. Ensure all files are current and compliant with legal standards.
- **Client & Lender Interaction:** Serve as the primary internal and external point of contact for the APM Legal Department.
- **Compliance:** Assist General Counsel in oversight of compliance with mortgage lending and related laws. Assist General Counsel with matters involving state and federal business law, including wage and hour, labor and employment, unfair/deceptive business practices, contracts, insurance and benefits, etc.
- **Civil Court/Administrative Support:** Work with General Counsel and outside legal services providers to prepare and respond to legal matters,



including civil discovery and the various documents filed in litigation and administrative proceedings.

- **Trial Preparation:** Support General Counsel in internal investigatory and civil legal matters by gathering and organizing relevant documents, conducting email and other internal document searches, coordinating with witnesses, etc.
- **Corporate Governance:** Gather, organize and maintain confidential corporate records, draft and maintain key corporate documents, such as non-disclosure agreements and corporate resolutions, attend and take minutes at all quarterly meetings of the APM Board of Directors, interact with the trustee(s) of APM's Employee Stock Ownership Program (ESOP), manage matters related to APM stock ownership, sale, repurchase and/or transfer, interact and engage with corporate Executive Leadership and the APM Board of Directors on all matters related to corporate governance.
- **Due Diligence:** Collect and organize confidential corporate information for production to counterparties in connection with key transactional matters, such as mergers and acquisitions, asset sales, private equity agreements, etc.
- Other duties as assigned.

Supervisory Responsibilities:

None

Qualifications:

To perform this job successfully, the employee must be able to perform all essential job duties. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Competencies:

To perform the job successfully, an individual should demonstrate the following competencies:

Interpersonal Skills – Commitment to use of video meetings and phone calls (as opposed to email) whenever possible to build relationships with corporate staff and APM branches. A customer service mindset, the ability to set and manage priorities and the ability to maintain confidentiality are essential job duties.

Problem Solving – The Legal Assistant must be analytical, evaluative, and problem-solving, and should be able to identify and resolve problems promptly; gather and analyze information; develop alternative solutions; work well in group problem-solving situations; use reason when dealing with emotional topics or people.



Detail Oriented – This position requires attention to detail and strong organizational skills

Oral Communication – The Legal Assistant should be able to present ideas in a business and user-friendly way; use plain language and make positive/confident presentations; listen well; ask questions and otherwise actively participate in work meetings.

Written Communication – This position requires the ability to write clearly and informatively; edit work for spelling and grammar; present data effectively and carefully; read and interpret written information provided by General Counsel and other co-workers.

Teamwork – The Legal Assistant must be a team player; work well in collaborative environment; make a positive contribution to APM’s work culture..

Attendance/Punctuality – The Legal Assistant must report to work on time; ensure essential work responsibilities are covered when absent.

Dependability – This position requires the ability and willingness to follow specific instructions and direction; ownership of mistakes/errors as they occur; ability to manage multiple priorities and meet deadlines; ability to complete tasks on time; willingness to ask for assistance when necessary to complete a task.

Initiative – The Legal Assistant should be self-motivated and directed; willing to assist co-workers in other departments when needed; willing to cross-train in other roles, willing to accept increased responsibilities and other forms of personal development.

Innovation – APM encourages original thinking and creativity. The Legal Assistant must embrace the *Kaizen* model, i.e., willingness to express ideas to improve quality and efficiency within in the Legal Department and other aspects of APM’s business operations.

Education & Experience:

- 2-3 years as a legal assistant, paralegal or similar legal administrative professional with a business law firm or in a corporate legal department. Experience in the mortgage industry is preferred.
- An associate degree in paralegal studies or a related legal field preferred. A paralegal certificate is a plus.

Skills:

Language Skills: Ability to read and interpret documents and write routine correspondence. Ability to speak effectively with customers/vendors or other employees.



Mathematical Skills: Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent.

Reasoning Ability: Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form.

Computer Skills: Proficient in Microsoft Office Suite and other software such as DocuSign, etc.

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

While performing the duties of this job, the employee is regularly required to sit, use hands to finger, handle, or feel and talk or hear. The employee is occasionally required to walk and stoop. The position will be mostly sedentary and require constant repetitive movements.

Work Environment: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level and temperature in the work environment is usually moderate.

This job description does not promise or imply that the functions listed are the only duties to be performed or that the position may not change or be eliminated.



The Company has reviewed this job description to ensure that essential functions and basic duties have been included. It is intended to provide guidelines for job expectations and the employee's ability to perform the position described. It is not intended to be construed as an exhaustive list of all functions, responsibilities, skills, and abilities. Additional functions and requirements may be assigned by supervisors as deemed appropriate. This document does not represent a contract of employment, and the Company reserves the right to change this position description and/or assign tasks for the employee to perform, as the Company may deem appropriate.

**My signature below indicates that I have reviewed this job description and understand my job duties and responsibilities. I am able to perform the essential functions of the Legal Assistant position as outlined. I understand my job may change on a temporary or regular basis according to the needs of my location or department, with or without any modification to this written job description. If I have questions about job duties not specified in this job description that I am asked to perform, I will discuss those questions with General Counsel or contact the APM Human Resources Department for assistance.*

Employee Signature: _____

Employee Name Printed: _____

Date: _____