



## Marie Koster: Trusts and Estates Paralegal, Quarles & Brady, LLP, Milwaukee, WI

[By Judith Earley]

Without hesitation, Marie Koster describes the best part of being a paralegal by saying, “I love the people contact. I love helping the client through the difficult job of trust or estate administration. The clients tend to need a lot of hand-holding, and I want to be that person. I think being a good listener is what the clients need during this grieving process.”

Boredom with her position as an administrative assistant put Koster on the path to a career with more responsibility. “I knew I had to go back to school for more training, so I looked at what some of the fastest-growing professions were.” Continued Koster, “I came across an ad in the local newspaper about a new program being offered at the local college. It read: ‘If you want to be on the cutting edge with the fastest-growing profession, become a paralegal. If you are detail-oriented, an organizer, and ready to take on responsibility, this is the profession for you!’ I signed up the next day.”

After obtaining her bachelor’s degree in business administration, *magna cum laude*, from Concordia University, Koster was part of the first class of graduates to receive their paralegal certificates from Carthage College’s paralegal program.

Koster is a trusts and estates paralegal for Quarles & Brady, LLP, which employs more than 400 attorneys and 70 paralegals and has offices in Chicago, IL; Madison, WI; Naples, FL; Phoenix and Tucson, AZ; and her location, Milwaukee, WI. She has been a paralegal for 19 years and has worked at Quarles & Brady, LLP, for most of the last 8 years.

According to Koster, her responsibilities at Quarles & Brady include drafting probate pleadings, transferring assets into the name of the estate and/or trust, preparing an inventory listing of the assets as of the date of death and their value on that date, preparing an accounting from the date of death through closing of the estate or trust administration, preparing fiduciary income tax returns, preparing and filing estate tax returns, and transferring assets to the beneficiaries.

Koster explained how the process works. “With the start of a new file, I am usually introduced to the family as the person who will be doing most of the work under the supervision of the attorney. It is explained that I do the work at a much lower hourly rate than the attorney.”

“It is at this time that you try to develop a bond with the client, letting them know that you understand this is a difficult time for them—having lost a loved one—and that you are there for all questions, big or small, to help them through the administration process.”

But Koster admits that while some parts of her job are fun, others are emotionally draining, like the telephone calls to family members to notify them of a loved one’s death.

It is fairly obvious that Koster is good at her job; she often receives photos from the clients of their grandchildren, postcards when they are traveling, and emails letting her know how they are doing. “Recently, I visited a person in the Catholic Home who was reading poems to the other residents. These were poems that she had written through the years. She gave copies of these poems to me, and I treasure them dearly,” said Koster.

One of Koster’s proudest moments was being appointed by the state bar to the paralegal task force. The task force was charged with preparing a petition to be filed with the Supreme Court regarding the licensure of paralegals in the state of Wisconsin. That petition is still pending in the Supreme Court. Other professional accomplishments include being named Wisconsin’s Paralegal

of the Year in 2003 and this year being named by the ABA as part of a team that conducts an ABA approval process for paralegal programs.

Koster said she feels the extreme competitiveness between law firms, banks, trust companies, and financial institutions—all of which are vying for the same business. A trusts and estates paralegal must always be concerned about the billable hours in relationship to the work being done, with an eye to remaining cost-efficient to the firm. “Like any other business, you must keep the cost in perspective along with the quality of the work you are turning out. We are always looking at ways to do it better, faster, and more efficiently. Along with that thought is what can you provide to the client that others do not?”

Koster’s advice for students who are preparing for paralegal work is to become computer literate. “No matter what area of law you are in, you always use the computer; so proficiency in all the basic programs—such as Word, Excel, and PowerPoint—is imperative,” said Koster.

And when asked if she could do it all over again, what would she change or do differently, Koster’s answer was simply, “I would have become a paralegal sooner.”

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