

Paralegal II – Corporate

PeopleSoft Job Code / Title: 2054 | Paralegal II
Facebook Title: 00377 | Paralegal
Department / Subdepartment: Legal Professional and Paralegal
Organizational Relationship: Reports to the Legal Professional and Paralegal (LPP) Committee
FLSA Status: Non-Exempt
UCM Level: n/a
Last Updated: June 5, 2025

Department / Subdepartment Overview

Corporate Department

Role Overview

The Paralegal II assists the departmental attorneys and senior paralegals in the coordination of all phases of a transaction from its inception through closing.

Essential Duties and Key Responsibilities

“Essential duties” are those that an individual must be able to perform with or without reasonable accommodation.

- Assists senior Corporate paralegals and attorneys with completing client work in an efficient and timely manner, with exceptional attention to detail
- Assists attorneys with maintaining and managing various corporate and finance transactions including research and analysis of corporate records, drafting and maintaining checklists, document and deliverable tracker, closing documents and certificates, and reviewing and finalizing legal contracts for execution
- Prepares initial drafts, forms, and maintains documentation for various business entities including corporations and limited liability companies
- Assists with preparing documentation for forming, registering, maintaining, and dissolving legal entities, including filing required documents, obtaining employer identification numbers, and preparing, organizing and maintaining minute books and other corporate records
- Creates and maintains Carta files (and other equity software program files)
- Onboards records for new clients, including organizing, reviewing, and summarizing all corporate and transactional documents and capitalization tables
- Prepares drafts of minutes, consents, transfer documents, officer certificates, and related corporate documents
- Assists with all areas of financings (public and private), including preparing closing checklists, trackers, signature pages and collecting and compiling final versions of all closing documents
- Follows up on post-closing items, including preparation of related closing indices and closing sets
- Assists, proofs, and coordinates with financial printers in connection with the filing of annual and interim reports for our public companies
- Prepares and files documents with the SEC (Section 16 filings, including Forms 3, 4 and 5, as well as applying for EDGAR filing codes, when necessary, and Form D and Schedules 13D/G

- Coordinates with other areas and departments of the firm where overlap exists to develop efficient procedures and communication to stream-line processes and satisfy various department needs
- Assists with special projects on various issues when needed
- Promotes effective work practices, works as a team member, and shows respect for co-workers

Knowledge, Skills & Abilities

- Thorough knowledge of state corporation laws and federal and state securities laws and regulations
- Well-developed and professional interpersonal skills; ability to interact effectively with people at all organizational levels of the firm
- Ability to work in a team environment with a customer-service focus
- Strong communication skills, both written and verbal
- Ability to manage time well, prioritize effectively, and handle multiple deadlines
- Ability to handle confidential and sensitive information with the appropriate discretion
- Knowledge and proficiency in PC applications, including MS Office, Excel and Carta
- Intermediate to advanced skills in research involving federal, state and local government agencies, regulatory agencies and corporate service companies websites

Position Specifications

Typical Experience

- A minimum of five years' of related law firm experience as a paralegal required

Education

- Bachelor's degree or equivalent or paralegal certificate from an ABA-approved program required
- Signed declaration required if located in a California office

Working Conditions and Physical Demands

- Occasional travel may be required
- Extensive time using a computer including use of a PC keyboard and mouse or similar data input devices is required
- All Latham & Watkins positions are in a typical indoor office environment

The statements contained in this position description are not necessarily all-inclusive; additional duties may be assigned, and requirements may vary from time to time, and from location to location.