

Rachel Hale

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SENIOR LITIGATION PARALEGAL | PROBATE, FIDUCIARY DISPUTES & FINANCIAL ANALYSIS

PROFESSIONAL PROFILE

Senior litigation paralegal with extensive Georgia probate litigation experience and hands-on probate work in North Carolina and South Carolina. Manages contested estates, fiduciary disputes, and financial exploitation matters from intake through trial preparation. Applies a B.S. in Accounting and full-charge bookkeeping background to estate asset, bank record, and fiduciary transaction analysis. I take complex work, organize it, and close it out, and I build the systems attorneys rely on to keep high-volume caseloads on track.

CORE CAPABILITIES

Georgia, North Carolina & South Carolina Probate • Contested Estates & Fiduciary Litigation • Pleadings, Motions & Petitions • Discovery & Subpoenas • Depositions, Mediation & Trial Preparation • Estate Accounting & Financial Reconciliation • Legal Operations & Workflow Automation

PROFESSIONAL EXPERIENCE

Sawyer & Associates | Senior Litigation Paralegal | Remote Apr 2026 – Present

- Manage contested and uncontested probate matters in North Carolina and South Carolina, coordinating pleadings, subpoenas, hearing materials, and deadlines with supervising attorneys; prepare estate inventories and accountings.
- Built the operations for the firm's Georgia probate practice in under five months: a 44,000-word SOP manual, a 22,000-word paralegal field guide, petition-type guidance, and an escalation system; designed an approved tiered fee proposal and overhauled the engagement agreement.
- Architected matter workflows across practice areas: standardized probate workflows for NC, SC, and GA, a multi-phase GA contested litigation workflow, and an estate-planning workflow, supported by a numbered task library, a standardized GA matter-type and 15-folder filing structure, and a training video for team leads.
- Built case trackers for GA, NC, SC, and estate-planning matters in Excel and SharePoint, with Office Scripts and Power Automate automation on the GA and EP trackers (auto-archiving, revenue sync, aging flags, KPI reporting).
- Engineered custom automation tools for NC, SC, and GA matters: an estate accounting workbook generator, an heirship family-tree builder, and an intestate share calculator for attorney review.

Georgia Probate Lawyers | Senior Paralegal / Case Coordinator | Remote May 2022 – Apr 2026

- Independently coordinated 60 to 90 active contested probate and related matters (160 at peak), maintaining case calendars, priorities, and communication across a demanding litigation docket at a 74% billable utilization rate.
- Reviewed bank statements, property documentation, estate transactions, and fiduciary records; performed reconciliations and prepared financial reviews to help counsel assess discrepancies, accounting disputes, and potential misappropriation.
- Supported contested administration, fiduciary conduct, elder financial exploitation, and disputed distribution matters: drafted petitions, motions, discovery, subpoenas, and notices; coordinated e-filing, service, production, depositions, and hearing and trial preparation; organized evidentiary records with attorneys.
- Served as primary client contact through emotionally sensitive disputes, explaining procedural developments, gathering critical records, managing expectations, and driving toward resolution.
- Developed case-monitoring dashboards and standardized reports tracking 300+ weekly activities and automatically flagging any matter untouched for 30 days; independently built a Python document-assembly system for recurring court packets.

Reddish & White CPAs | Full-Charge Bookkeeper / Administrator | Hybrid Oct 2018 – Jan 2022

- Managed full-cycle bookkeeping and financial reporting across a portfolio of 60+ small-business clients, including account reconciliations, journal entries, and profit-and-loss reporting.
- Reviewed transactional records, resolved discrepancies, supported tax preparation and compliance workflows, and assisted with QuickBooks Desktop-to-Online transitions.

EDUCATION

B.S., Accounting (Auditing) | Purdue Global University | April 2024

TECHNOLOGY & SYSTEMS

LEAP • Lawmatics • PracticePanther • Microsoft 365 (Excel, Office Scripts, SharePoint, Power Automate) • Monday.com • Google Workspace • QuickBooks Desktop & Online • DocuSign • eFiling • Python + AI-assisted development (Claude Code)