



Charlotte Munns

PARALEGAL ASSISTANT

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OVERVIEW

Charlotte is passionate about helping clients with private wealth matters.

As a paralegal assistant, Charlotte supports paralegals in establishing and maintaining tax and estate files so attorneys can offer appropriate plans and resolutions for clients. She prepares irrevocable trust administration forms and applications for tax identification numbers, assists in building case management files and handles the e-filing of probate matters.

With nearly 20 years of experience in the legal field, Charlotte is familiar with a variety of practice areas. She chose to pursue paralegal work because she enjoyed the research involved, but what she appreciates most is simply the opportunity to help people and provide any services needed. It's a focus that fits well with private wealth, where Charlotte supports clients in their efforts to build a secure future for their families.

Industry

Financial Services & Capital Markets

Service

Private Wealth