WiggamLaw
TAX RESOLUTION ATTORNEYS

1275 Peachtree Street NE, Suite 500
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wiggamlaw.com

Client Intake Specialist

Answer the first call that turns tax stress into peace of mind.

Wiggam Law is hiring a Client Intake Specialist to join our growing sales and client experience team. You'll help guide people through some of the most financially stressful moments of their lives — with empathy, speed, and precision.

This isn't your average admin role. You'll be a key driver of firm growth, handling inbound inquiries, preparing engagement documents, and owning the intake process from first contact to handoff, with clear goals, real impact, and room to grow.

About Wiggam Law

We're a boutique tax resolution firm headquartered in Midtown Atlanta. We help individuals and businesses overcome IRS and state tax issues with confidence and clarity. Recognized as the 4th fastest-growing law firm in the U.S. by Law Firm 500 and a Bloomberg Law Leading Law Firm, we deliver expert legal strategy with a human touch.

Our culture balances excellence and empathy, precision and play, growth and groundedness. If you want to be part of a tight-knit team that wins together and has fun doing it, you'll fit right in.

What You'll Do

You'll manage both the people-facing and systems-facing sides of client intake. Think: part client guide, part process ninja.

Your Core Responsibilities

- **Convert leads into clients.** Handle inbound calls and emails with empathy and professionalism; schedule consultations; follow up with qualified leads and convert them to clients to drive firm growth.
- **Onboard new clients.** Accurately and efficiently draft and send engagement documents, collect payments, and process Power of Attorney (POA) forms.
- **Keep everything moving.** Track next steps for no-shows, inactive leads, and new client handoffs to progress potential new clients through the sales pipeline.
- **Own the data.** Ensure firm CRM records are complete and accurate across Lawmatics, Clio and Dropbox. Keep the CRM pipeline updated.
- **Collaborate across teams.** Partner with legal, sales, and administrative staff to hand off leads who become clients and deliver a smooth new client experience.

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- **Support our Transcript Monitoring Service**. After a case closes, introduce clients to our ongoing monitoring service, follow up on interest, and prepare engagement documents for those who opt in.

Your Key Outcomes

- Call-to-client conversion targets met quarterly
- Engagement documents sent within 48 hours of request
- POAs processed and submitted within 48 hours of receipt from new clients
- Client record accuracy at 98% or above

What You'll Need

You don't need a legal background: just the skills to communicate, follow through, and work with heart.

- Technical degree or higher level of education required
- 2+ years in client intake, sales support, customer service, or admin roles with **heavy phone/email interaction**
- Strong phone presence and **clear, professional communication**
- Comfort with **structured processes and CRM tools** (Lawmatics or Clio is a bonus)
- High attention to detail — especially with documents, forms, and client data
- The ability to **stay calm under pressure** and help clients feel heard and supported
- Tech fluency with Google Workspace, Microsoft Office, Adobe applications and cloud tools
- A desire to **solve problems and improve workflows**, not just complete tasks
- **You manage your time well** and stay focused when juggling multiple tasks
- **You work well independently,** but thrive in team environments too

What we offer:

- Generous benefits package
- Competitive compensation
- Accrued paid time off
- Employer-provided health insurance
- Dental and vision insurance are available
- Paid group disability and life insurance policy
- Up to 4% 401K match
- An annual retirement contribution from the firm's profit-sharing plan
- Paid parking or monthly MARTA fare
- Clear growth path with the opportunity to evolve into a sales role or move to other areas of the firm

Compensation:

- $40,000 - $45,000 salary, based on experience
- Quarterly bonus for hitting performance goals

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Why This Role, and Why Now?

We're expanding fast, and intake is at the heart of that growth. You'll help shape how we welcome new clients and how we scale. You'll report directly to the Head of Client Experience, with dotted-line visibility to sales and legal leadership.

This is a rare chance to own a process, see the impact of your work in real time, and be part of a team that's building something meaningful and doing it with heart.

Ready to Apply?

Send your **resume** to admin@wiggamlaw.com
Subject line: **Client Intake Specialist – Application**