**Administrative Assistant**

Job Description

**Classification**

Regular, Part-Time

**Pay Rate**

Hourly

**Reports to**

Owner

**Date**

6/16/2017

**Position Summary**

This position is responsible for coordinating and executing regular client service activities, maintaining accurate client reporting and billing procedures, and partnering with the owner to ensure the client experience is personable and comprehensive.

**Essential Functions**

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

1. Establish and maintain professional relationships with all clients and vendors
2. Coordinate and execute client service activities, such as onboarding new clients, gathering and compiling data for client meetings, maintaining client files, ensuring all client paperwork is in good order, handling day-to-day client questions and inquiries, as well as creating and pulling reports
3. Schedule meetings, transcribe meeting notes, process tasks, and resolve issues in a timely and accurate manner
4. Maintain accurate client reporting and billing procedures via QuickBooks, including quarterly billing review to ensure proper fees have been assigned
5. Work with appropriate vendors for all IT and office equipment maintenance needs
6. Manage all incoming phone calls, mail, and deliveries
7. Develop and maintain an email management system to file, sort, and easily find and retrieve emails and client communications
8. Maintain client management software by updating client information, including addresses, phone numbers, and client work tasks
9. Maintain a neat, organized, efficient, and welcoming office environment
10. Establish and maintain a paperless office environment by converting paper files to electronic files
11. During tax season, assist with preparing and mailing tax returns and tax return data entry

**Competencies**

The following competencies are essential for performing well in this position:

1. Attention to Detail - *The ability to be thorough and accurate when reading, interpreting and performing tasks.*
2. Client Relations - *To nurture, protect and enhance the relationship between the company and its clients.*
3. Integrity and Honesty - *Upholds the highest job-related, business and socially acceptable ethics. Stands up for what is right. Committed to sharing and hearing the truth, even when it’s difficult to do so.*
4. Organization and Time Management - *Ability to use time, resources and skills effectively in order to achieve a goal.*
5. Takes Initiative/Self-Driven - *Ability to see an opportunity or need and act upon it without being asked or told. Acting in anticipation of future needs, changes or concerns. Making things happen; not waiting for something to happen.*
6. Teamwork - *Works well with others; plays an important role on the team without needing to take the lead; values ideas and input of others.*

**Supervisory Responsibilities**

This position has no supervisory responsibilities.

**Work Environment**

Job duties for this position will be performed in a typical office environment with minimal noise or other disruptions.

**Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this position, the employee is regularly required to talk, see and hear. This position is sedentary. The individual in this role must be able to remain seated and use a computer for prolonged periods of time. Hearing and speaking are required in this role, as the individual will be interacting with advisors, co-workers, clients, and vendors on a daily basis. Some light lifting up to 25 lbs. occasionally required.

**Expected Work Hours**

The individual in this position will be expected to work **20 hours per week**, Monday through Friday between 8:00am - 5:00pm, **during regular season**. Shifts are flexible.

The individual in this position will be expected to work **30 hours per week**, Monday through Friday between 8:00am - 5:00pm, **during tax season**, January to April. Shifts are flexible.

**Travel**

Minimal travel will occasionally be expected for local errands. Additional travel may be required as the duties of this position increase in responsibility. Less than 10% travel.

**Required Education and Experience**

1. Minimum formal education of high school diploma or GED
2. Minimum of two (2) years of general administrative assistant experience
3. Minimum of two (2) years of tax preparation experience
4. Minimum of two (2) years of QuickBooks experience
5. Intermediate skill level using the Microsoft Office Suite, including Word, Excel, PowerPoint, etc.
6. Experience using client management software

**Preferred Education and Experience**

1. Experience using Capsule, client management software, highly preferred
2. Expert skill level using Excel spreadsheets
3. Experience using Pro Series tax software

**Work Authorization** In compliance with federal law, all persons hired will be required to verify identity and eligibility to work in the United States and to complete the required employment eligibility verification document form upon hire. In addition, the candidate must submit to and pass a pre-hire background check.

**Equal Employment Opportunity Statement**

Lang Accounting Services provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, sexual orientation, national origin, age, disability or genetics. In addition to federal law requirements, Lang Accounting Services complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.

**Other Duties**

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice. Other duties may be assigned as necessary.

**Signatures**

This job description has been approved by:

Stacy Herman Lang, CPA \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position as outlined in the Administrative Assistant job description.

Employee \_\_\_\_\_\_\_\_\_\_\_​\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_