

JOB DESCRIPTION

Position Title:	Direct Administrative Assistant	Supervisor:	Senior Account Manager
Primary Assignment:	Senior and Account Manager Assistance	Secondary Assignment:	Front Office Administrative Services, Special Assignments

Position Purpose

Fulfill the corporate mission and vision by performing Administrative Assistant duties in accordance with Firm values.

Performance Expectations

The Direct Administrative Assistant is expected to:

- A. Assist Account Management teams with assigned Book of Business.
- B. Perform administrative functions for assigned Book of Business.
- C. Complete other projects as assigned by the Account Management Team.

Duties

The Administrative Assistant position purpose will be achieved by effectively demonstrating:

- A. Prompt, professional and accurate completion of projects assigned by the Account Management Team. Assigned processing duties may include:
 1. Prepare correspondence as directed by assigned Account Managers.
 2. Accurate and prompt completion of basic bookkeeping accounting tasks utilizing client records.
 3. Facilitate efficient administration for each account by filing, monitoring and releasing client payroll and tax return documents as required.
 4. Promote smooth account administration by corresponding with Clients, Account Managers, Department Managers and other personnel as required.
 5. Prepare forms as directed by assigned Account Managers and to support Department Managers.
 6. Research and resolve document related issues as directed by Account Managers.
 7. Set up clients and maintain client information in Practice.
 8. Retrieve QuickBooks, Sage or Peachtree backups from clients.
 9. Maintain tax season readiness as directed by Account Managers.
 10. Manage NetClient accounts for Account Management Team Book of Business.
- B. Prompt, professional and accurate completion of assigned reception tasks. Assigned tasks may include:
 1. Receive and route visiting and calling clients according to approved protocol.
 2. Process incoming and outgoing postal mail according to approved protocol.
 3. Process incoming correspondence received via email and fax.
 4. Schedule appointments for designated Account Managers.
 5. Provide Public Notary services.

- C. Proactive engagement in ongoing professional development.
 - 1. Maintain expert knowledge, skills, and abilities in core areas by seeking out and participating in continuing education courses, seminars, and other learning opportunities.
 - 2. Review appraisal findings and collaboratively create professional development plans with the Senior Account Manager.
 - 3. Execute professional development plans.
 - 4. Participate in selected and designated training opportunities to ensure proficient knowledge, skills, and abilities in assigned areas.
- D. Client relationship building initiative.
 - 1. Identify, develop and systematically implement agreed upon services that enable the firm to remain on the forefront of customer service delivery.
 - 2. Collaborate with other department personnel by communicating effectively, offering expertise when requested and requesting professional input from other content experts as required.
 - 3. Remain current on “other” internal and external services offered by the firm to help clients achieve specific goals or satisfy particular needs.
 - 4. Implement firm processes for identifying client opportunities and recommending “other” services.
- E. Active engagement in continuous department improvement planning and execution.
 - 1. Initiate identification and communication of issues to keep management aware of opportunities for department and/or organizational improvement.
 - 2. Participate in department action planning with other personnel as directed by Senior Account Manager.
 - 3. Execute continuous department improvement plans with fidelity.
 - 4. Continuously monitor annual action plan execution and report progress to the Senior Account Manager.
 - 5. Actively evaluate department plans with the Senior Account Manager and adapt plans flexibly through daily practice and periodic meetings or work sessions.
- F. Compliance with all handbook policies and operational procedures.
- G. Completion of other projects and duties assigned by the Account Management Team.

Position Qualifications

A. Education and Experience

1. Administrative Assistant or Receptionist experience with a career history of accurately completing work and other assignments in a timely manner.

B. Knowledge, Skills and Abilities

1. Customer Service. Demonstrated use of principles and processes for providing outstanding customer service. This includes customer needs assessment, meeting quality standards for services and evaluation of customer satisfaction.
2. Judgment and Decision Making. Demonstrated ability to systematically consider relative costs and benefits of potential actions; critically analyze related variables; and logically apply reasoning when selecting goals and making plans.
3. Communication. Demonstrated use of communication to understand and correctly interpret information and ideas presented through non-verbal, verbal and written modes as well as to convey information and ideas professionally to individuals and groups through presentation of words, actions, and documentation.
4. Technology. Demonstrated use of computers, Microsoft Office Suite software, internet and other electronic means to gather and disseminate information; communicate with colleagues and customers; construct and revise Word and Excel documents; and store and retrieve data.
5. Economics and Accounting. Demonstrated use of economic and accounting principles/practices, financial analysis and succinct reporting of financial data.
6. Attendance. Demonstrated ability to consistently arrive to work on time and remain focused on task throughout the day without allowing distractions to interfere with completion of work.