

## **ADMINISTRATIVE ASSISTANT**

This position provides administrative support to the office in a variety of clerical duties, such as receptionist, client billing, management of time and billing system, assisting with office functions, and processing financial statements and tax returns.

A successful candidate relies on experience and judgment to plan, and accomplish tasks and provide assistance to executives that provides value through increased efficiency. A wide degree of creativity, latitude and initiative is expected.

### **JOB RESPONSIBILITIES AND TASKS**

- Provide clerical assistance as needed in the form of correspondence, memos, reports, engagement letters, proposals, faxing, filing, copies and client deliveries
- Creation, organization and preparation of annual tax organizers for each office
- Perform procedures to set up a new client and monitor databases for consistency
- Creation of Power of Attorney and other legal documents for staff and partners
- Correct and bind audit, comp, review reports
- Assist with processing tax returns
- Scan and prepare work paper files for accounting, tax, audit, comp and review engagements; log into tracking
- Provide quality customer service and maintain good client relations by providing accurate information and responding to client needs with timely and friendly communication.
- Monitor staff time in billing system – daily with reporting
- Maintain accounts receivable, research billing questions and issues with clients, print billing reports, enter employee client related expenses, setup new clients and enter client expenses
- Draft, finalize & mail bills, update files, print & mail monthly billing statements and collection efforts
- Post cash receipts to Practice
- Create and maintain front office/processing area instruction and guiding documents
- Work independently and within a team on special and ongoing projects. May include planning and coordinating company wide events and activities
- Receptionist duties
- Assist managers and supervisors with administrative matters as time allows
- Off-site storage management and tracking of records

### **SELECTION CRITERIA OR QUALIFICATIONS**

- High School Diploma or Associates Degree
- Minimum of 4 years experience in Administrative Assistance in the accounting field preferred
- Must have high level of interpersonal skills to handle sensitive and confidential information.
- Proficiency in Microsoft Office applications. Able to gain proficiency in other software applications as needed.
- Strong oral and written communication skills
- Excellent organizational and time management skills
- Able to perform multiple tasks under deadline driven situations
- Detail oriented and possesses a positive attitude
- Confidence and comfort interacting with a variety of people at all levels

LOCATION – Lee's Summit, Missouri office

No agencies please.