JOB RESPONSIBILITY – BUSINESS & PERSONAL ADVISORY - CLIENT SERVICES ADMINISTRATORS

Reports to: Business & Personal Advisory Partners
Business & Personal Advisory Managers

The performance expectations below form a large part of your six monthly and annual performance evaluation

There are a variety of day to day administrative tasks required as part of your role. The below encompasses the main tasks. Given the nature of the role there will be other tasks required on as needs basis in order to support the team:

1. Client additions, deletions and maintenance forms.
2. Returning client records.
3. Typing of letters and simple reports to clients.
4. Filing.
5. Dealing with client and ATO correspondence and enquiries.
6. Making and changing appointments.
7. Fee preparation assistance.
8. Preparing checklist of information required from clients.
9. Reviewing and checking client source documents when received.
10. Contacting clients for any missing information or general queries.
11. Logging of each job on the Job Register.
12. Monitoring of WIP.
13. Monitoring BAS lodgements.
14. Monitoring workflow
15. Creation of TFN, ABN, GST and PAYGW registrations.
16. Advising clients of PAYG instalment obligations.
17. Checking of income tax assessments.
18. Advising clients of tax file number.
19. Forwarding of HECS statements to clients.
20. Review and forward clients' running balance account from the ATO.
21. Printing and binding finalised annual financial statements and taxation returns & draft preparation of OFS letters and other client reports (e.g. Count GPS Reports).
22. Checking BankLink data in from and out to clients.
23. Incorporation of companies and the set up of trusts and SMSF's.
24. Completion of annual company returns.
25. Attending all Corporate Secretarial matters including completion of ASIC Forms and Annual Reviews.
26. Monitoring work checklists to meet ATO due dates.
27. Correctly filing paperwork in files.
28. Sending off each month (via email) client account invoices.
29. HR - assist HR team (tasks such as minutes of meeting, help with recruitment, job ads, attending meetings etc.) - assist as required.

30. Marketing - assist marketing team as required.
31. Opening and actioning of daily mail.
32. Sending client faxes and ensuring delivery of same.
33. Downloading of Tax Agent Portal reports for staff.
34. General Business & Personal Advisory administrative support to your direct Partner, Manager and Team.

Qualifications, Skills or Experience Necessary:

You will be highly organised and display excellent skills in the following -

- Excellent verbal and written communication skills
- Confidence and professionalism
- Proactive nature
- Ability to prioritise
- Work autonomously and as a team player
- Ability to listen and receive instructions from others and action accordingly
- Effective time management and multi-tasking skills
- Attention to detail
- Familiarity with MYOB / Sol6 Suite and Microsoft office would be advantageous as would experience working in an administration role in a professional environment.