



Client Concierge/Administrative Assistant – Full-time Position

Are you a self-starter? Do you describe yourself as ambitious and highly organized? Are you a team player—who has a strong desire to help??

If you answered “yes” to all of the above, we’ve got just the job for you! We’re seeking a highly driven person to join our small accounting firm, Wood CPA, as a full-time Client Concierge/Administrative Assistant. Established almost four years ago, our firm is experiencing *rapid* growth.

What does that mean for you? It means **unlimited potential** for our employees as our firm continues to expand. If you’re looking to help clients and manage projects, while utilizing technology, then this is the place for you.

The right candidate will be ready to wear many hats as the business grows, and can count on having a refreshing amount of variety and excitement in their work day. If you’re excited to join the crew of a small business where growth is the name of the game, then we’re excited to hear from you!

This position is responsible for a wide range of tasks, including:

Client-facing tasks:

- Communicate status of projects with clients
- Helping clients use the portal
- Answering phone calls/responding to emails
- Greeting clients as they come into the office
- Provide additional copies of tax returns
- Check the status of tax refunds
- Screen potential new clients

Behind-the-scenes tasks:

- Manage workflow of tax returns/other projects
- Scan documents
- Assemble/deliver tax returns electronically
- Prepare packages for mailing
- Social media marketing
- Other functions as needed

Experience required:

- 2+ years of experience in a similar role (accounting firm experience is a plus)
- Software experience, including (but not limited to) scanning, copier/printer, phone systems, client portal

Benefits:

- On-site fitness center and café
- 15 PTO days per year
- 9 company holidays and 2 additional employee’s choice holidays
- Family-friendly environment
- Flexibility with hours