



Client Experience Specialist – Full-time

Are you a self-starter? Do you describe yourself as ambitious, friendly, and highly organized? Are you a dedicated 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 Experience Specialist. We offer competitive pay based on experience (starting at \$52,000/year) with performance-driven increases.

Established almost five 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 provide clients with an exceptional experience 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 workday. 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 the following tasks:

- Respond to client questions in a professional, timely manner
- Manage the entire new client process – schedule initial meeting, follow-up with needed documentation, proposal, onboarding – ensuring proper communication throughout the process
- Data management in various internal applications
- Manage workflow of tax returns/other projects
- Assist with setting up monthly seminars

Skills Required:

- Highly organized and task-driven
- Strong written and verbal communication
- Excellent customer service – friendly/personable/professional
- Accounting degree or equivalent knowledge
- Marketing interest

Experience preferred:

- 1+ 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, Microsoft Office Suite, HubSpot, Ignition, QuickBooks Online

Benefits:

- Retirement plan
- Health insurance reimbursement
- On-site fitness center and café
- PTO
- Paid Holidays
- Family-friendly environment
- Flexibility with hours