

JOB SPECIFICATION

Client Service Administrator



Purpose: Reporting to the Admin Team Leader, this role is to provide the highest quality administration function, a first class client experience to the accounting team and to our clients. Responsibilities will include having a process and technology mindset to streamline an effective solution.

Business Area: Accounting & Taxation

Reports to: Admin Team Leader

Roles & Responsibilities



Leadership:

- Demonstrate strong people skills
- Ability to lead a team, inspire, influence & hold individuals accountable
- Ability to train & develop team members
- Enhance and maintain the Mathews Steer culture by actively seeking continual improvement of yourself, your team and the business and ensuring the practice vision, mission, purpose and values are adhered to.



Project Management (preferable, not essential):

- Ability to research and review options, selection criteria and provide recommendations
- Ability to project manage from start to finish including setting up scope and cost benefit analysis and communication to all stakeholders



Technology & software skills:

- Understands the future impact of technology
- Looks for technological solutions to repetitive tasks
- Data integrity management
- Database management - APS Reckon and CAS knowledge (or similar)
- Advanced skills in Microsoft Office Suite (Word, Excel, Outlook, PowerPoint)



Workflow Management

- Ability to self-review work
- Ability to prioritise & use time effectively
- Ability to meet deadlines
- Communicates delays/issues



Awareness and interaction:

- A change enthusiast who is solutions focused
- Agile and resilient with a growth mindset
- Positive energy with a can do attitude
- Great negotiating and influencing skills

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- Expresses opinions clearly and logically with excellent verbal and written communication
- Ability to develop professional relationships
- Willingness to help others
- Demonstrates initiative
- Demonstrated high professional standards
- High attention to detail

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Provide administrative support to the business at all levels:

- Preparation of client correspondence including ATO Notice of Assessments
- Collation of financial statements and tax returns and preparation of associated letters and invoices using various software & document management systems
- Manage incoming / outgoing telephone enquiries – ATO, ASIC, clients etc.
- Ongoing maintenance of client data
- Corporate Secretarial management using CAS 360
- Formation of business structures such as companies, trusts and SMSFs
- Attend to reception overflow incoming calls which could include organising / scheduling appointments for any team member
- Administer on boarding and exiting clients.
- Prepare client / external presentations using PowerPoint and general admin support for the wider team
- Ability to document own work instructions for all tasks performed
- Reception relief

Qualifications



Cert IV qualification or above in Business Admin (or equivalent)