Baas & Associates PC
Certified Public Accountants

Role: **Part-time Office Manager, Administrative Assistant, and Receptionist (Hybrid/Remote)**

Onsite/Hybrid Work Location: Omaha/West Omaha (Boystown area/vicinity - just off 144th & Dodge Street)

Pay: Hourly | $18/hour - $30.00/hour depending on experience.
Performance & Other Incentives: Tax season/year-end bonus opportunity; Retention bonus (6 month); frequent Achievement hourly pay rate increases

Position post/available date: January 12, 2024

Skill, training, and experience categories:
Finance & Accounting/Receptionist and Customer Service
Finance & Accounting/Office Administration
Finance & Accounting/Finance, Investment and Wealth Management, Banking
Finance & Accounting/Virtual Conferencing, Communications & Collaboration

Hiring Contact:
***Baas & Associates, PC***, Attn. Chris Baas; Tel: 402.389.7300; Fax: 402.393.4787; chrisbaas@baascpas.com

**Responsibilities:**

This is a role for an experienced financial services/professional services firm office manager, client and project coordinator, client service delivery and problem solving, and client relationship manager/receptionist. This position will communicate with and speak to clients via incoming telephone calls, office visitors and be responsible for client communication planning, scheduling, coordination and execution, and respond to client needs, manage telephone calls and email messages, handle electronic, verbal, and written communications, and perform general administrative work (as directed/necessary) in addition to general client relationship management and communications, service delivery, and general office tasks.

Standard duties will include: client interaction and customer service; managing incoming client telephone traffic; the request and collection of client information, documents, financial account information and sensitive confidential income tax return preparation related information (forms and documents), and other accounting and tax data; communication with clients as related to front office tasks, functions, and responsibilities; client relationship development and management. Other office duties also will include: client appointment and virtual meeting scheduling when needed, document imaging and scanning; organizing, processing, and assembling (not preparing) client tax returns/deliverables/other documents for client delivery; verbal and written client and team member communications and client activity coordination; computer data-entry; document organization and scanning and electronic archiving of completed client documents, forms and tax filings in hosted document management software platform; Federal (IRS) and state tax agency tax filing compliance deadline tracking and filing due date management and related client communications; the use of various small business management and office administrative/communication software and accounting/tax industry software packages in performing the above mentioned tasks and functions. This position may also include the support and management of various other client requests and functions not listed above.

**Requirements:**

A good candidate for the position will be dependable, energetic and a detail-oriented professional with excellent verbal and communication skills and telephone demeanor, and strong e-mail and written communication skills. This front office, front line role, with a moderate amount of client interaction includes customer communications, correspondence, and interaction in response to time-sensative client inquiries relating to personal and business sensitive and confidential financial affairs and various accounting/tax/payroll/business and other customer account management and servicing issues.

- 2-5+ years of prior financial service environment or professional service firm experience preferred.
- Outgoing personality and enjoys working with and helping people.
- Works efficiently and effectively within time constraints and under some pressure as the need arises.
- Independent worker, requiring little supervision, who possesses a high level of initiative and communicates and collaborates effectively and efficiently with team members, both verbally and in writing.
- Great work attitude and work ethic required; multi-tasking, prioritization, and organizational skills a must.
- Exceptional attention to detail with perspective.
- Stable and consistent employment history.
- Prior experience in public accounting, banking, customer service, wealth and investment management, or financial services industry highly preferred.
- Bachelor/Associates Degree desired but not required.
- Ability to type at least 45 wpm.
- Experience with Microsoft Office suite of software products (emphasis in Excel, Outlook, Word, and related).
- Prior use of Microsoft teams, Google Meet, and/or Zoom virtual meeting, video, and text chat collaborative software platforms desired.
- Prior recognition of and familiarity with accounting software and small business management software (i.e. Intuit Quickbooks® or Quicken®, Thomson Reuters Creative Solutions®, CCH ProSystemFX ®, Sage Software®) and/or comparable accounting industry software experience preferred.
- Interest in continued learning and professional development.
- Proven prior experience and achievement preferred.