

Tax Administrative Assistant – MarksNelson

About the job:

Would you like to be part of the largest privately-owned Kansas City public accounting and business advisory firm? Are you looking for work that is challenging and gives you a sense of accomplishment– and offers flexibility to balance your work and personal life? At MarksNelson, you'll work alongside subject matter experts with some of the strongest accounting, technology, and business skills in the market. At the same time, you'll be part of a winning culture and thriving workforce. Come with us and we'll help you move your career forward at a pace that is right for you.

We have an opening in our Tax team for a full-time Administrative Assistant. If you are an organized, detail-oriented individual who is looking to build upon your experience, this may be the perfect opportunity for you. As an Administrative Assistant, you'll be responsible for a variety of administrative functions. This is an opportunity to work with a dynamic team of motivated professionals in a collaborative environment. A strong customer service mentality and a neat, professional appearance is key to this role, as you'll be interacting with both internal and external business partners.

What you'll be doing:

- Produce various tax returns, client proposals, and engagement letters
- Display proficiency with basic tax terms and firm standard language of various tax return correspondence
- Proficient with organization and scanning of client tax information in AutoFlow and documents into electronic filing system
- Maintain integrity and accuracy of workflow database
- Serve as back-up for production administrative tasks as needed
- Prepare and track client engagement letters, proofread and edit correspondence, perform mail merges, ensure formatting is within firm standards, provide managers with billing reports and ensure invoice deadlines are met
- Book travel arrangements (i.e., flights, rental cars, hotels) - provide a detailed itinerary with directions to each destination; confirm client/prospect meetings, and process travel expenses to the client, as needed
- Schedule and maintain partner and department calendars within Outlook
- Proactively assist in meeting preparation both internally and externally by anticipating and ordering food, scheduling conference rooms, and setting up video conferencing



MarksNelson
Move Forward

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- Assist with project workflow and maintain status of team members' schedules
- Prepare client and firm presentations for various staff levels and needs
- Help prepare and reconcile invoices and submit expenses
- Prepare and send faxes, mail, and courier parcels
- Consistently maintain firm electronic filing system
- Maintain and follow-up on due date reports monthly
- Reconcile month-end firm credit card statements and compare to the Department budget
- Run errands (i.e., pick up lunch for department or client meetings)
- Proactively identify opportunities to support the department
- Answer phones on behalf of the front desk as needed
- Work with other department staff to provide seamless client service
- Complete software and training programs as required

What you'll bring to the role:

- Associate of Arts degree in secretarial science or related field from an accredited college or business school and two years of administrative/secretarial experience; or high school diploma or GED and four years of clerical/secretarial experience
- Proficient in Microsoft Office (i.e., Outlook, Excel, Word, PowerPoint); knowledge and operation of standard office equipment
- Prior administrative experience preferred
- Requires reliable transportation and a valid driver's license

Why MarksNelson?:

Our culture values teamwork, ideas, and collaboration. We are a Team that supports one another and values the individual contributions of our employees. We offer competitive compensation, robust employee benefits and an ideal work/life balance. Your career is important to you – and it's important to us too. That's why we focus on providing tools and opportunities that help you reach your career goals.

Interested?

Please forward your resume to: recruiting@marksnelsoncpa.com