



smart accounting decisions

## DETAILED JOB DESCRIPTION

### Client Services Assistant

#### About atr Accountants

atr Accountants are a proactive and growing accounting practice located on the North West Coast of Tasmania. We specialise in Business Advice and Coaching, Taxation Planning and Compliance and Self-Managed Superannuation.

#### Position Description

Title: **Client Services Assistant**  
Reporting to: **Executive Manager**

#### Position Summary

To meet the business needs by attending to client service and administration requirements. As the main point of contact with clients, the successful applicant will have strong customer service skills and exhibit professionalism in responding to client enquiries.

#### Position Responsibilities

- Answer any client queries and other information as required
- Perform admin duties such as letters, correspondence, filing, scanning and other documents as required
- Coordinate data and records collection and any required follow up of clients
- Prepare checklist of information required from clients
- Review and check client source documents and contact clients for missing information
- Log and maintain job register
- Restore client file
- Initial preparation of electronic work papers including printing file index, accounting job checklist etc.
- Print ATO accounts for entity and/or associated individual
- Pre-fill GST work paper
- Prepare fee proposals

- Check BankLink data in from and out to client on a monthly and quarterly basis
- Collate and prepare financial and other reports for distribution to clients
- Admin support to Director including appointment scheduling and general office organisation
- Admin support to manager as required
- Business entity set up and registration
- Prepare and lodge ATO applications such as ABN, TFN, GST & PAYG
- Complete daily timesheets
- Manage office environment including equipment, IT, maintenance etc.

## Position Competencies

- Displays a reasonable knowledge and understanding of a professional office environment
- Demonstrated interest in pursuit of following an administrative career with a genuine interest in business activities
- Displays each of the following attributes – excellent work ethic / dedication / punctual / initiate / personality / proactive / attention to detail / organised / self-motivated
- Confident enough to develop client relationships and build rapport with staff, business partners and clients

## Position Qualifications

No formal qualifications are required for this position. However studies in Business Administration would be highly regarded.

## Position Experience Required

- Proven experience in a professional office environment
- Proven experience with a busy multi-line telephone system
- Proven experience with office software such as Microsoft Office
- Sound knowledge of general administration processes
- Proven typing ability
- Proven experience in accounts receivable or payable
- Maturity and responsibility

## Position Experience Desired

Knowledge of and/or experience using:

- BankLink
- MYOB AE Enterprise
- QuickBooks
- MYOB
- ATO Portal

## In Return for your Commitment you will enjoy

The firm is searching for individuals who are looking for a long term future with a firm that has a fun working environment as well as being family friendly. We also offer extensive training and support.

## Application Instructions:

Please attach your cover letter and resume to an email and send to [jdebomford@atraccountants.com.au](mailto:jdebomford@atraccountants.com.au). If you do not have access to email, please mail your cover letter and resume to PO Box 257, Wynyard, TAS 7325.

Questions and enquires regarding the position can be directed to Cameron Taylor:

Phone: 03 6442 3772

Email: [ctyalor@atraccountants.com.au](mailto:ctyalor@atraccountants.com.au)

**We are looking to fill the position immediately, however are flexible in our timelines to suit the right person.**