| POSITION DESCRIPTION | |
|---|---|
| **Position Title** | **Client Services Assistant** |
| **Reports to** | **Office Manager** |
| **General Description** | To assist the entire team to deliver a range of compliance and business advisory services and reports to clients. |

| Team Responsibilities | System |
|---|---|
| Embrace the Mission of the business. | ▪ Mission Statement. |
| Understand how we work with and build relationships with our clients. | ▪ The Basis of Our Client Relationships. |
| Adhere to our client service standards. | ▪ Client Service Standards. |
| Professionally handle client queries. | ▪ How to Handle Client Queries. |
| Professionally handle client complaints. | ▪ Dealing with Complaints. |
| Be familiar with Our Firm's Areas of Operation. | ▪ Our Firm's Areas of Operation. |
| Conduct our business in compliance with ethical practices. | ▪ Ethics. |
| Adhere to the Health and Safety Policy. | ▪ Health and Safety – How We Do It Here. |
| Assist in answering incoming telephone calls. | ▪ Telephones – Answer Incoming Calls. |
| Maintain detailed and accurate time sheets. | ▪ Timesheets – Entering Hours Worked. |

| Individual Responsibilities | Systems |
|---|---|
| **Admin** | ▪ Maintaining the Client Database: |
| | ▪ Client Additions |
| | ▪ Client Deletions |
| | ▪ Returning Client Records |
| **Operational** | ▪ Assist team members in a range of tasks: |
| | ▪ Fixed Price Agreement (FPA) Preparation |
| | ▪ Advising Clients of ABN and GST Registration |
| | ▪ Advising Clients of PAYG Instalment Obligations |
| | ▪ Advising Clients of Personal Income Tax Assessments |
| | ▪ Advising Clients of Tax File Number |
| | ▪ FBT Completion Procedure |
| | ▪ Forwarding of HECS Statements to Clients |
| | ▪ Review and Forward Clients' Running Balance Account from the ATO |
| | ▪ Printing and Binding Finalised Annual Financial Statements and Taxation Returns and other Client Reports |
| | ▪ Checking BankLink Data In from and Out to Clients |

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|---|---|
| | ▪ Incorporation of Companies |
| | ▪ Completion of Annual Company Returns |
| **Marketing** | ▪ Assist in Obtaining and Recording Testimonials from Clients |