



CREATIVE PLANNING

Title: **CPA Administrative Assistant**

Location: Any Location

OVERVIEW

BerganKDV recently joined Creative Planning, a top tier wealth management firm that provides investment management services and full comprehensive financial planning in-house. Creative addresses all aspects of financial planning from estate planning, tax strategy, and risk management to retirement, education, charitable planning, and business advisory – using all in-house specialists. Creative Planning also assists clients with external business services such as payroll, technology support, and attest work to name a few. This is a unique opportunity to join a top tier firm paving the way for unparalleled client and team member experiences.

We do not accept resume submissions from third party recruiters or staffing agencies. Please contact our talent team directly.

JOB SUMMARY

This position is a top contributor to our employer brand by kicking off a world-class experience for clients and guests when they arrive. In addition, you will provide general office support with a variety of clerical activities and related tasks including answering the phone, formatting, proofing, binding, copying, scanning, filing, mailing, and creating PDFs. This position is seen as a go-to support function for the entire office and will accordingly, work on a variety of tasks (e.g. scheduling and general administrative support for leadership) all while representing our core values that makes us who we are!

JOB DUTIES

- Receive client tax documents via mail & electronic delivery
- Find and add Creative Planning wealth management tax documents, MLP K-1's, and other client information as needed
- Sort information to prepare for scanning in CCH
- Contact clients with status update of tax or audit information.
- Scan client documents into CPA systems.
- Outgoing mail processing, including UPS overnight shipments
- Process & assemble tax returns that are ready to be delivered to clients
- Proof client deliverables as needed
- Receive mail and file, sort, and distribute mail
- Receives e-file authorization forms and releases returns to IRS & States
- Assist with various projects and other duties as assigned.
- Answer incoming calls and assume receptionist duties when needed, i.e. lunch coverage rotation
- Schedule appointments
- Greeting clients & visitors

REQUIRED EXPERIENCE / QUALIFICATIONS

- High School diploma
- 2 years of experience in an administrative position or support role
- Multi-task, problem solve, and complete all assigned duties
- Strong written and verbal communication; excellent interpersonal skills
- Utilizes office machines such as computers, copier/scanner, printers, and calculators
- Organized and detail oriented; able to maintain records and files
- Able to conduct themselves in a professional manner with clients and internal staff
- Ability to produce high quality work; able to maintain confidentiality at all times
- Strong understanding of Microsoft Office suite

EXPLORE THE WORKPLACE OF THE FUTURE

Together, we are building the nation's preeminent wealth and business advisory practice, by providing a comprehensive suite of services that support and empower individuals, families, institutions, and businesses. Our values drive our decisions, and our passion is putting our clients at the center of everything we do.

Creative Planning Differentiators:

- Day One Benefits Enrollment
- Growth Potential
- Close-Knit Collaborative Team
- Mentor Program
- Employee Referral Rewards
- Comprehensive Benefits Package
- Customized Career Paths
- Open Door Leadership Style
- Firm-wide Trips for All Team Members
- Creative Planning Cares

BENEFITS THAT GO BEYOND

We are proud to offer a competitive and comprehensive benefits package, with options designed to help you make the best decisions for yourself, your family, and your career. Our competitive compensation package is catered to reward you for your performance and recognize you for the value you bring to our business. In addition, our total package includes medical and dental coverage, matching 401(k) plans, PTO, observed holidays and a range of programs and benefits designed to support your physical, financial, and social well-being.

Creative Planning is an equal opportunity employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state, or local laws.

We will ensure that individuals with disabilities are provided reasonable accommodation to participate in the job application or interview process, to perform essential job functions, and to receive other benefits and privileges of employment. Please contact us to request accommodation.