



CREATIVE PLANNING

Title: **CPA Administrative Assistant**

Location: Urbandale, IA

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