



CREATIVE PLANNING

Title: **CPA Administrative Assistant**

Location: Cedar Rapids, 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

- Provide executive support to Managing Director
- Attend meetings as needed
- 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
- Proof client deliverables as needed
- Receive mail and file, sort, and distribute mail
- 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

Creative Planning, LLC is an independent wealth management firm, whose affiliates also provide business consulting, tax, financial, and other professional services to clients. Creative Planning and its affiliates lease employees and other resources to BerganKDV, an independent, separately governed, and licensed CPA firm, in support of audit and attest services BerganKDV provides to its clients.