



CREATIVE PLANNING

Title: **Tax Front Desk Coordinator**

Location: Overland Park

JOB SUMMARY

Creative Planning Tax, LLC is a part of the Creative Planning group and works in conjunction with the wealth managers to provide tax consulting and compliance services.

The **Tax Front Desk Coordinator** will work directly with each tax employee to support them in various administrative duties to ensure they can make optimal use of their time supporting clients.

JOB DUTIES

- Greets clients and employees as they exit the elevator
- Announce clients to tax managers/directors for appointments
- Answers phones and directs call; addresses questions using in-depth knowledge of company services
- Orders and maintains inventory of stationery and tax deliverable items
- Coordinates maintenance and repair of office equipment (copiers, postage meter, coffee maker, etc)
- Ships in-house office supplies and replacements as needed
- Process & assemble tax returns that are ready to be delivered to clients
- Prepare invoices for all returns to be delivered
- Receives e-file authorization forms and releases returns to IRS & States
- Send tax engagement letters and consent forms to clients and manage the form intake
- Communicate with clients regarding tax fees as needed
- Ability to work extended hours around tax deadlines (April 15th, September 15th, October 15th)
- Required to work in HQ office
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Two to five years of experience in an office environment
- Associate of Arts degree, or work experience equivalent

PREFERRED EXPERIENCE / QUALIFICATIONS

- Experience in an office environment with a large volume of tasks
- Excellent communication skills
- Detail oriented, sense of urgency, calm under pressure, self-starter, team-oriented

TECHNICAL SKILLS

- Proficiency in MS Office with expertise in Word, Excel and PowerPoint
- Technology is integral to our business model so you will need to possess an ability to quickly learn and adapt to new systems and technology