

# WOUCH MALONEY

CPAs & BUSINESS ADVISORS

**Job Title:** Administrative Assistant  
**Department:** Compliance  
**Reports To:** Firm Administrator  
**Classification:** Full-time

## General Summary

The major duty of the Administrative Assistant is to render support for the accounting staff of the firm. This person will also back up the other Administrative Assistants as well.

## Essential Job Functions:

- Communicate with clients and visitors to ensure that the firm is represented in a professional manner
- Answer, screen, and transfer phone calls for the accountants - providing timely messages to ensure quick follow up
- Annual coordination of client tax organizer mailings to help with the collection and submission of client information necessary for tax return preparation
- Assembly of completed tax returns for individuals and businesses
- Assistance with e-filing of tax returns to federal and state authorities
- Monitor and maintain renewals of staff licenses and memberships
- Schedule and track staff continuing education training requirements
- Assign and monitor proofing and quality review of financial statements and other documents
- Assist with processing and assembly of clients' tax returns and IRS Forms W-2 and 1099
- Scheduling assistance and deadline monitoring of various deadlines
- Client billing and collections
- Serve as back-up to the other Administrative Assistants
- Other duties as assigned

## Desired Skills, Abilities and Characteristics

- Excellent phone manner with a customer service attitude
- Strong organization skills
- Excellent time management
- Excellent proofreading skills
- Attention to detail
- Display professionalism
- Basic understanding of accounting and/or its environment is a plus.
- Good interpersonal skills
- Ability to multitask
- Good written and verbal communication
- Intermediate to Advanced proficiency with all Microsoft applications (especially Excel)
- Desire to "pitch in" whenever needed
- High energy and positive attitude!

## Education and/or Experience

- High school diploma required, Bachelor's degree in Business Administration or related field preferred
- At least five years of related experience required
- Experience working in an accounting firm is a plus