**JOB DESCRIPTION**

**JOB TITLE:** Client services administrator

**EMPLOYEE:**

**REPORTS TO:** Compliance Manager

**DATED: March 2021**

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**POSITION SUMMARY**

Working as part of a team to:-

* Ensure our clients receive their financial statements in a timely manner.
* Maintain the client database in an accurate state at all times.
* Provide administrative support.

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| **Key Responsibilities** | **Tasks** | **KPIs** |
| Client Service | * Collating of clients financial statements.
* Extraction of tax returns.
* E filing of income tax returns.
* Tax administration – including refunds, assessments, overdue payments, credit balances, disputed assessments, provisional tax notices, transfers, secure mail
* IRD registrations and de-registrations.
* Companies office administration, including incorporation of companies, filing annual returns for companies, limited partnerships and incorporated societies as required.
* Maintaining share registers.
* Following up clients for the return of signed documents.
* Preparation of various client correspondence – sending accounts to banks, sending back client records, forwarding closed client records to new accountant.
 | * Tasks are completed within agreed timeframes.
* Work is completed without significant errors.
* All company annual returns filed on time.
* Acknowledgement of receipt of email and phone messages within 24 hours. (Working days)
* No clients receive incorrect client correspondence.
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| Team administrative support | * Client database management.
* Set up of client files.
* Client deletions.
* Client fee preparation support – annual companies office billing.
* General administrative support to the team.
* Any other duties as may reasonably be required of you.
 | * Database is maintained without errors.
* Invoicing is completed in accordance with billing processes.
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| Workflow  | * Completion of assignment information sheet and receiving client annual information.
* Inputting budgets, updating workflows and weekly workflow reports.
 | * Budgets entered in by the second business day of each week.
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| Team leadership and development | * Understanding of work delegated to you.
* Learn more difficult and complex jobs.
* Actively participate at coffee catch ups and internal training sessions.
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| **Qualifications, Experience and Competencies** |
| Qualifications & Experience | * Preferably administrative experience in commercial office environment.
* High degree of skill, knowledge and experience in Microsoft Office suite.
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| Core competencies | * Problem solving skills
* Verbal, listening and writing skills
* Internal communication
* Planning and organisation skills
* Timeliness, accuracy, responsibility, attention to detail
* Adherence to internal procedures
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| What MDP expects from you  | * Jobs completed on time and accurately
* Able to manage workload, establish priorities
* Responsible for all CSA tasks collectively and work within the team to achieve desired outcomes
* Meet KPI’s
* Communicate clearly and in a timely manner with clients and team members
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| What MDP wants from you | * Able to relate to others, understanding their needs
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| Personal attributes | * Able to work under pressure
* Ability to meet deadlines
* Flexibility
* Helping other team members when appropriate
* Excellent time management skills
* Excellent communication and interpersonal skills
* Being part of a team
* Work in a focused manner and with attention to detail
* Willingness to continue learning
* Displays each of the following attributes – excellent work ethic/dedication/punctual/initiative/personality/

pro-active/attention to detail/organised/professional |
| Demonstrate MDP core values | * Vibrant
* People focused
* Driven
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This job description is intended to form part of your employment agreement and replaces all previous job descriptions.