



Tax Administrative Assistant

Barton, Walter & Krier, P.C. ("BWK") is a full-service CPA firm with the talent and expertise to offer an array of accounting, audit, consulting and tax services -- all prepared in accordance with professional standards. We are committed to developing strong customer relationships so that we can better understand our clients and assist them with year-round planning. We listen to our clients' needs and strive to exceed expectations.

At BWK, we offer a dynamic work environment that is both supportive and engaging. We foster a culture of innovative thinkers and are proud to support you in your professional goals. If you are passionate about helping clients succeed at a collaborative, innovative and experienced firm, BWK is the place for you.

We are conveniently located in Maple Grove, MN; servicing businesses state-wide.

Title: Tax Administrative Assistant

Major Tasks, Responsibilities & Key Accountabilities:

- Ensure new clients are set up correctly for filing, archiving, correspondence, faxing, preparing and distributing documents, and photocopying. Ongoing maintenance of the client database.
- Process and assemble tax returns and extensions in proper order with appropriate attachments.
- Prioritize administrative work flow and manage multiple deadlines and requests.
- Run Due Date Reports from the Tracking Program (Access Workflow/XCM) and deliver them to various team members.
- Ensure new clients are set up correctly for filing, archiving, correspondence, faxing, preparing and distributing documents, and photocopying.
- Print & send the Tax Client Organizers to clients
- Scan and file confidential client information.
- E-filing returns and extensions. Follow-up on any rejections or other questions.
- Prepare and finalize documents with a strong working knowledge of tax preparation protocols.
- Answers phones (fill-in at main reception desk).
- Other duties as assigned to ensure the continued function of the organization.

Skills and Competencies

- Exhibit effective communication and listening skills.
- Ability to proficiently use technology tools in regular assignments and demonstrate commitment to improving work processes through use of technology.
- Excellent time management skills while managing multiple projects.

- The ability to meet deadlines with a high level of organization and focus on the detail.
- The ability to handle questions during the work day and still meet necessary deadlines.
- Focus and dedication to client service fulfillment at the highest level.
- Experience using Microsoft Office Suite, including but not limited to Word, Excel, PowerPoint, and Outlook.

Qualifications:

High School Diploma

Minimum of 3 years of tax firm administrative experience required.

Compensation:

This is a great opportunity to join a solid and growing firm. We offer a very competitive compensation plan and benefits plan that includes health, life and dental insurance; a 401(k) plan and other benefits that afford a healthy working environment.