



## CREATIVE PLANNING

Title: **Tax Administrative Assistant**

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 Administrative Assistant** will work directly with each Tax Director/Manager/Associate to support them in various administrative duties to ensure they can make optimal use of their time supporting clients.

### **JOB DUTIES**

- Provide administrative support to a group of tax preparers
- 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
- Assist with front desk reception duties when needed (lunch coverage rotation)
- Ability to work extended hours around tax deadlines (April 15<sup>th</sup>, September 15<sup>th</sup>, October 15<sup>th</sup>)

### **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 Outlook
- 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