

Executive Assistant / Client Services Coordinator

Are you an organized, proactive, and detail-oriented professional looking to join a dynamic and growing CPA firm? The Sharpe Group (TSG) is seeking a reliable Executive Assistant to support our principal partner with various client projects and to help streamline operations and keep our firm running smoothly. This role is perfect for someone who thrives in a fast-paced environment, enjoys problem-solving, and has experience in administrative support, bookkeeping, and client services.

Responsibilities:

Executive & Administrative Support:

- Manage partner's schedule, ensuring seamless coordination of appointments and deadlines.
- Handle and organize the partner's inbox, flagging important emails and responding when appropriate.
- Maintain and organize important client and internal documents without requiring direction.
- Assist with workflow management, prioritizing tasks and keeping the partner on track.

Client Service & Communication:

- Respond to client requests, such as sending copies of tax returns or processing payments.
- Handle tax-related tasks, including making tax payments and collecting required tax authorization forms (e.g., Form 8879).
- Send and follow up on 1040 document request lists for clients.
- Assist with collections by following up with clients regarding outstanding invoices.
- Occasionally pick up or drop off client documents, if needed.

Bookkeeping & Compliance:

- Perform bookkeeping tasks and assist with tax-related filings (sales tax, payroll tax registrations, 1099 preparation).
- Prepare simple tax-related forms such as POAs, S Corp elections, and bipartisan forms.
- Handle billing after reviewing it with the executive.

Business & Personal Support:

- Assist with forming new LLCs for clients.
- Register clients for necessary tax accounts, such as payroll and sales tax.
- Occasionally help with personal tasks such as scheduling doctor appointments or paying personal bills.

Ideal Candidate:

- Highly organized, self-sufficient, and proactive in managing tasks.
- Strong attention to detail and ability to manage multiple priorities.
- Excellent communication and customer service skills.

- Comfortable handling confidential financial and business documents.
- Deep understanding of the Microsoft 365 suite, including Outlook, Word, Excel, and Teams.
- Experience with CCH Axcess Suite is a strong plus.
- Previous experience in a CPA firm is preferred but not required.
- Familiarity with QuickBooks, tax software, and other financial tools is a plus.

Why Join Us?

- Opportunity to work closely with the principle partner of a growing CPA firm.
- A dynamic role that offers variety and growth potential.
- Competitive compensation based on experience.
- Supportive and collaborative work environment.

If you're ready to bring organization, efficiency, and exceptional client service to our team, we'd love to hear from you! Please send cover letter and resume to:

karend@sharpegroupnj.com