



Title: Administrative Assistant

Classification: Full Time, Non- Exempt

Location: Overland Park, KS

Summary and **JOB SUMMARY**

Essential

Functions:

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

**PRIMARY JOB DUTIES**

- Receive client tax documents via mail & electronic delivery
- Find and add Creative Planning wealth management tax documents, MLP K-1's, and other client information as needed
- Sort information to prepare for scanning in CCH
- Contact clients with status update of tax information
- Scan tax packages and add to preparation queue
- Outgoing mail processing, including UPS overnight shipments
- Process & assemble tax returns that are ready to be delivered to clients
- Prepare invoices for all returns to be delivered
- Receive Tax Department mail and sorts
- Receives e-file authorization forms and releases returns to IRS & States
- Communicate with clients regarding tax fees, receives tax fee payments, scans & records payment in Salesforce and client files
- Sends PayPal invoices to clients upon request
- Assist Directors with mailings and other requests as assigned
- Answer incoming calls and assume receptionist duties when needed, i.e. lunch coverage rotation

**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
- Adaptable
- Team oriented

**TECHNICAL SKILLS**

- Understanding and previous use of Microsoft Windows.
- Proficiency in MS Office with expertise in Word, Excel and PowerPoint
- 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.