Job Description: Receptionist

Skills & Requirements:
• Positive, bright, professional attitude.
• High School Graduate with wonderful people skills.
• Basic typing skills (minimum 30 wpm). No “hunting and pecking”, please.
• Moderate computer skills including use of Windows 7, Outlook, Microsoft Word and Excel.
• Numeric keypad skills (minimum 5000 kph).
• Enthusiasm for serving people with honesty and integrity.
• High level communication skills via phone, email and in person.
• Basic understanding of taxation and accounting concepts. You like numbers, right?

Major Job Responsibilities:
• Front Office (Positive Client Interaction):
  » Answer telephone, direct calls as needed, take messages.
  » Check voicemail, as needed.
  » Call/contact client “leads” to schedule appointments/consultations.
  » Make client appointments.
  » Greet arriving clients. Everyone should feel welcome.
  » Update client contact information in our computer database.
  » Call clients when returns are completed.
  » Present completed tax returns to clients.
  » Collect client payments, provide receipts, and record each transaction.
• Back Office (Details & Organization):
  » Assemble and collate printed tax returns for distribution to clients.
  » Scan and copy client documents.
  » General filing.
  » Record tax return activities in the Tax Return Log.
  » Contact Dave Ramsey and other leads for follow up.
• Other Responsibilities, as needed:
  » Provide water (or other refreshments) for clients.
  » Help clients’ children to feel comfortable in waiting area.
  » Make reminder appointment calls.
  » Folding, stuffing, collating for mailings.
  » Maintain mailing lists.
  » Other responsibilities as assigned.

Description:
Our growing tax and accounting office provides high quality services to small businesses and individuals. The Receptionist must reflect the positive professional attitudes that have helped build a successful practice. In the front office, he/she is often the first interaction with clients. This presents a great opportunity to reinforce our core values with each client while building a positive overall impression. Further client communications include telephone, email and mail – which require high level verbal and written skills. In other words, our receptionist must be a fantastic communicator.

In the back office, we expect all employees to show excellent attention to detail, commitment to client privacy and security, and overall professionalism. Each back office duty, such as filing, collating, scanning, logging tax returns, etc. is an important piece of our professional product. A successful team member completes these assigned tasks accurately, quickly and with an eye to our core values. All this must be done while maintaining our clients’ privacy.

Work hours are flexible, but during peak season the expectation will be to work most weekdays with rare Saturdays or evenings. We are closed on Sundays.

All employees are expected to maintain professional relationships with clients and other employees at all times. Integrity and honesty are minimum requirements for success. We want everyone to be inquisitive about tax laws. Asking questions, seeking advice, and conducting research are strongly encouraged. Thus, TaxSmart will pay the cost for successful completion of a basic Tax Preparation Course (approved in advanced). Further, all employees are required to
attend annual continuing education seminars provided at TaxSmart’s expense. All this enhances our ability to help our clients to “get it”. We want our clients to say, “Thanks for helping me to understand.”

Continued employment will be on an as needed basis. Therefore, hours will be scheduled only if there is sufficient work to be completed.

**Reports to/Supervisor:** President/CEO, Markham Peykoff

**Remuneration – Pay is on an hourly basis plus lead closure bonus:**

- Starting Pay = $10.00 per hour plus bonus.
- Lead Closure Bonus = $5.00 per lead which is converted to a completed appointment.
- Participation in company retirement plan, after 2 calendar years of service.
- Income tax preparation for you and your immediate family, if desired.

**About TaxSmart Business Services:**

A family owned and operated business which opened in 2002. Because of our passionate commitment to customer service and our focus on small business tax needs, the firm has continued steady growth. Therefore, we continue our strategy for providing excellent service and high quality tax information. Tax return preparation continues to be the core of our success, while small business write up work is a close second. Other components of our business include tax planning, payroll services, IRS audit representation, tax collections and negotiations, sales tax returns, tax research, etc. Other areas such as financial advising, estate taxes, independent audits and reviews are not currently part of our business model. Since 2007, we have been the exclusive Endorsed Local Provider (ELP) for Dave Ramsey in Cherokee, Pickens, and northern Cobb county. We continue our relationship with Dave Ramsey today as his exclusively endorsed tax preparation and accounting firm in the area.

**What makes TaxSmart Business Services different from other firms:**

- Attention to detail.
- Clients receive personal attention by a tax expert.
- Clients speak directly to their accountant.
- Free pick up and delivery for monthly clients.
- Reasonable/competitive prices.
- Open year round.
- Family owned and operated by Enrolled Agents.
- Enrolled Agents are federally licensed by US Department of Treasury and IRS.
- Endorsed by leading financial manager, Dave Ramsey.

**Application Procedure:**

- Submit resume with complete job history and 3 employment references to TaxSmart Jobs

  PO Box 280  
  Holly Springs, GA 30142  
  Or email: eo@taxsmart1040.com  
  Or through our website: www.taxsmart1040.com/secure-send.php

  • Three to Five applicants will be selected for initial interviews which will include brief computer typing and 10 key skills evaluation.
  • One or two applicants will be asked to complete a typing and 10-key test.
  • Final applicants will be required to successfully complete the following prior to final decision: pre-employment drug screening, criminal background check and credit check.

TaxSmart Business Services  
(770) 704-7777