

DRAFT Position Description



Position Description

Position	Office Manager / Bookkeeper
Reports to	Linda McGowan
Location	1st Floor, 52 Holmes St, Brunswick VIC 3056

Purpose of the position

To play a lead role in providing services that are responsive to client needs by providing quality administrative, reception and client support services.

Key responsibilities

Client liaison	<p>Provide professional and engaging telephone and office reception services, showing a genuine care and interest in clients.</p> <p>Attend to clients and meeting rooms.</p> <p>Keeps clients informed by maintaining contact as required and preparation of correspondence.</p>
Client service support	<p>Preparation of Income Tax Assessment Letters for business clients referencing Handi Tax.</p> <p>BAS / IAS co-ordination, calling in work, updating job flow, preparing letters and invoicing.</p> <p>Manage annual ASIC return letters preparing letters and invoicing.</p> <p>Collating business clients year-end tax work based on standard business client procedures.</p> <p>Preparation of Client Update Sheets for individual (non-business) clients.</p> <p>Audit Insurance monitoring and updates.</p>

Accounts receivable and banking	<p>Preparation of monthly debtors statements, letters and receipts.</p> <p>FeePay documentation for business clients with cashflow problems.</p> <p>Chasing up late payers.</p> <p>Banking as required.</p>
Administration and reporting	<p>New Client folder set up.</p> <p>Preparation of regular reports including daily workflow reports, AIB-to-bankings, Not-yet-lodged, Client events and receipts-to-bankings.</p> <p>General office duties such as filing, ensuring bathrooms and kitchen are maintained clean.</p> <p>Stationary orders.</p> <p>Setting up ITR meetings including ensuring that Portal Reports, excel spreadsheets and general file is in order as well as checking whether Audit insurance and previous years invoice is up to date.</p>
Health and safety	<p>Take care of own safety and that of co-workers</p> <p>Identify and communicate opportunities to improve health and safety</p> <p>Report all safety incidents and hazards</p>

Behavioural requirements

Planning and organising	<p>Identifies more critical and less critical activities and assignments; adjusts priorities when appropriate.</p> <p>Allocates appropriate amounts of time for completing work; avoids scheduling conflicts; develops timelines and milestones.</p> <p>Coordinates with team members and clients to ensure deadlines are able to be met.</p> <p>Uses time effectively and prevents irrelevant issues or distractions from interfering with work completion.</p>
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This position description is not an exhaustive list of all responsibilities, skills, efforts, or working conditions associated with this role.

Quality Orientation	<p>Accurately and carefully follows established procedures for completing critical tasks.</p> <p>Vigilantly watches over job processes, tasks, and work products to ensure freedom from errors or omissions.</p> <p>Initiates action to correct quality problems or notifies others of quality issues as appropriate.</p>
Communication skills	<p>Actively seeks to clarify others needs or queries.</p> <p>Conveys information in a clear and professional manner, uses syntax, pace, volume, diction, and mechanics appropriately.</p> <p>Engages team members, clients and others in a warm and inviting manner.</p> <p>Follows up with email or other confirmation as appropriate.</p> <p>Regularly checks in with team members regarding workloads, priorities and pro-actively seeks opportunities to assist.</p>
Team player	<p>Shares important or relevant information with the team.</p> <p>Willing to do what is required to assist the team.</p> <p>Recognises by ones self when opportunities present to help others and goes out of ones own way to help others.</p> <p>Makes others feel welcome, takes an interest in others wellbeing.</p>

Technical Skills

Experience with the full range of Microsoft Office products is essential. A foundation understanding of accounting and bookkeeping principles as well as experience with standard accounting software packages is preferable.

Hours

This is a full time role.

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