



Client Relations Coordinator – Position Description

Position Summary

OnTarget CPA is seeking a Client Relations Coordinator to join our team. The Client Relations Coordinator will serve as a primary liaison between the firm's clients and its professional staff. This individual will be responsible for onboarding clients and delivery of final work product. The successful candidate will communicate proactively to ensure deadlines and clients expectations are met. This position is an excellent fit for a customer service orientated professional seeking an opportunity within a growing firm.

Specific Responsibilities

- Onboarding new clients
- Follow up on client leads
- Intake, organization and follow up on information needed from clients
- Respond to client requests for information
- Delivery of tax returns and other client work product
- Schedule client meetings
- Organization and maintenance of client data, electronic files
- Organization and maintenance of online client portal
- Make federal and state tax payments on behalf of clients
- Assist with Accounts Receivables, client invoicing, schedule client payments
- Track Indiana and out-of-state business renewals, renew as requested
- Continue ongoing education by participating in webinars, workshops, conferences, etc.
- Provide exceptional customer service
- Positively contribute to office culture
- Ensure accuracy and quality control of all work product
- Maintain confidentiality with personal and sensitive data

Qualifications and Competencies

- Two years of administrative, customer service, or hospitality experience
- Detail orientated
- Ability to multitask, prioritize, and organize efficiently
- Excellent verbal and written communication skills
- Supportive of OnTarget CPA's core values

Preferred Qualifications

- Familiarity with a professional services firm and/or accounting experience

ontargetcpa.com



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- Advanced technology skills
- Desire to grow and advance through continued training

Salary and Benefits

- High quality health insurance, dental insurance, and vision
- Auxiliary cancer and critical care health coverage
- Life insurance
- 401K plan with company match
- Bonus opportunities
- Company paid parking
- Paid time off, paid holidays
- Professional incentives, including paid continuing education
- Best-in-class technology and software
- Employee incentives, including employee meals during tax season, paid staff outings
- Competitive salary, commensurate with experience

About OnTarget CPA

OnTarget CPA is a forward-thinking firm located in the heart of downtown Indianapolis. A certified public accounting firm, OnTarget CPA specializes in accounting, taxation, IRS resolution, and consulting needs for individuals and small to medium size companies. As one of the top CPA firms in Indianapolis, our focus is on providing exceptional personal service to our clients.

To Apply

Send resume and cover letter to renee@ontargetcpa.com. No phone calls, please. Remote employment will not be considered.

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