



Key Results Areas

Administrative Assistant

Provide organizational management to keep the team on the same path

- Answer Phones
- Greet Clients
- Provide day-to-day management of the office
 - Coordinate and/or monitor days off of all staff members
 - Order professional tools for staff (i.e. Quickfacts, etc) and programs (Lacerte, FINPACK, etc)
 - Plan monthly staff lunches
 - Recognize Employee Birthdays on Social Media & with Treats
 - Recap meeting notes so everyone walks away with the same understanding
 - Coordinate travel days for consultants & assistants
 - Book Hotel Rooms
 - Keep Schedules for the Car/Yukon
 - Book Meeting Rooms
 - Schedule maintenance for vehicles
- Assist with general office duties as needed
 - Be able to assemble tax returns
 - Be able to enter PcMars statements
 - Review written materials and presentations created for accuracy.
 - Take mail to the post office or box daily
 - Help with completion of the average books
 - Other items as assigned by the Executive Director
- Help with the promotion of NFBI
 - Update and maintain the website
 - Create newsletters and get them ready for printing and mailing
 - Gather Materials for speaking events, trade shows, etc.
- Purchase supplies for the office, as needed
 - Order from online stores (Office Depot, Staples, Eakes)
 - Order specialty supplies (Tax return envelopes/folders, binder coils, Tab Dividers, Promotional Materials)
 - Order Checkpoint Quickfinder Books in June to get discount (ask consultants what they want and place order, then distribute when they come in)
 - Pickup supplies from Sam's Club
- Cleaning & Maintenance
 - Vacuum common areas as needed (Workroom and bathrooms cleaned by service)
 - Keep coffee pot and area clean and stocked.
 - As time allows, vacuum and dust offices.
 - Keep trash cans emptied both at desk and in common areas.
 - Keep reception area clear of trash/boxes/excess files, etc. so it looks presentable at all times.



Key Results Areas

- Manage the client database:
 - Keep names and addresses current
 - Maintain email address
 - Make sure services are current
 - Provide lists of clients to consultants for each visit time
- Manage electronic data
 - Organize DMS (or other electronic file system) and ensure all long term documents are scanned legibly and available for use if needed.
 - Scan documents
- Coordinate with IT consultants on technology troubles, software installs, etc.
- Complete E-file process
- Update the van & car mileage logs as needed
- Update postage allocation log as needed.
- Update copier allocation log as needed.