

Holmans Pty Ltd

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Client Service Coordinator

Primary responsibilities will include, but not be restricted to assisting the accountants in completing client work on time; to contribute to the overall delivery of first-class client service.

A little about us;

We are a reputable long established 4 partner firm based on the Northern end of the Sunshine Coast who pride ourselves on providing exceptional service and advice to our clients. We genuinely care for our clients and work together with them in their businesses. We are motivated, professional and work collaboratively to achieve results.

Our team is growing, and we are looking for the right person to come on this journey with us.

Client Service Coordinator

Holmans Client Service Coordinator will have the following qualities:

- Friendly and welcoming
- Excellent client service skills
- Able to communicate easily and build relationships with our clients
- Exceptional attention to detail
- Willingness to learn and to share knowledge
- Positive attitude
- Highest standard of ethics, confidentiality and professionalism
- Initiative
- Willingness to contribute to a positive team environment
- Strong organisational and time management skills
- Ability to learn new computer systems quickly
- Willingness to understand the range of services offered by Holmans

Experience and qualifications:

- Proficient in Microsoft Office, including Word, Excel and OneNote
- Xero, BGL and ASIC experience viewed favourably

Duties:

- Primarily preparing the preliminary workpapers for Accountants (prepare workpapers, naming, filing, ATO reports, scanning in client documents)
- Back up for Administration/Reception, answer incoming phone calls & client visits
- Make appointments for clients
- Print and collate tax returns and financial statements
- Lodge ITRs and check incomplete lodgments
- Setup Corporate Secretarial for new businesses
- Corporate Secretarial backup
- Prepare and lodge company forms through ASIC, ABR etc.
- Filing, retrieve files, company registers and archived information as required
- Manage the client database, including process clients leaving
- Assist with functions, including event registrations and meetings
- Prepare boardroom for meetings (laptop, projector, etc)
- Attend internal and external training as required
- Comply with Holmans Performance Standards
- Provide feedback to managers to help improve workflow and efficiencies
- Other duties as requested

Conditions:

Classification: Full time, or Part-time (Minimum of 25hrs per week).

Hours: Standard hours 8:30am – 5:06pm (1 hour lunch break). However, Friday reduced hours do apply, but mean a reduced lunch break if Full-Time.

Location: Noosa, Sunshine Coast

Reports to: Partner

Direct reports: Nil