

Client Support Job Description

Team Objective

As of 2022, WCG Inc. is a mid-size tax and accounting firm with 5 partners, about 40 employees and \$7.M in revenue located in Colorado Springs, CO and Mitchell, SD. We primarily engage with small business owners (S Corps, Partnerships, PCs) and complex individual tax preparation. We take a consultative approach to our client engagements by offering routine consultation and a strong focus on planning and business advisory services. Tax return quality and efficiency naturally occurs from routine client interaction throughout the year.

Basics

- ▲ Applicants must have a pleasant demeanor with clients, and your fellow co-workers, and excellent organizational skills and attention to detail.
- ▲ Because of the close proximity to Partners and Directors, applicants must have discretion with certain intimate data and details
- ▲ Prefer experience at a public accounting firm in some capacity.
- ▲ \$60,000 to \$70,000 total compensation for salaried employees, or \$30 to \$35 per hour for hourly employees. Bonuses, if offered, are considered in addition to total compensation (for this position, bonuses are based on qualitative intangibles).

Locations

- ▲ 2393 Flying Horse Club Drive, Colorado Springs, CO 80921
- ▲ Remote location as a new hire is generally not available for this position. Hybrid remote work is available after a period of time and may be approved on a case-by-case basis.

Job Duties

You will be working with and supporting all other WCG team members, plus our wonderful client base. Your duties include-

- ▲ Answering client phone calls and emails (**primary**),
- ▲ Monitoring, screening, responding to and distributing incoming calls or emails (**primary**),
- ▲ Filing and organizing electronic documents,
- ▲ Mailing documents to clients and government agencies,

- ▲ Connecting with clients to gather essential information,
- ▲ Assisting other team members with tasks specific to their business segment (Tax, Accounting, Payroll, Operations or Business Development),
- ▲ Maintaining calendars including scheduling appointments and meetings, collecting payments for consultations, anticipating scheduling conflicts and compiling necessary documentation for appointments,
- ▲ Helping to keep the workflow moving, and
- ▲ Other tasks as requested by other team members.

All salaried positions must work 2,000 hours annually.

Other Requirements

All salaried positions must work 2,000 hours annually / 12-month trailing period. See attached projected hour table by week as an example. Holidays and other office closures count towards the 2,000 hours (e.g., Thanksgiving would contribute 8 hours towards the 2,000-hour requirement). PTO and other employee-requested leaves do not count towards the 2,000-hour requirement. Please refer to the WCG Employee Handbook for additional information.

This position touches all major segments primarily client support, operations and tax.

Career Path

The career path for Client Support is Client Services Manager or Tax Support, Tax Preparation, Payroll Processing, Accounting Services, Operations or Business Development segments.

How to Apply

Please visit our website for current openings, company-paid benefits, a description of who we are and the “how do I get this cool gig?” series of steps-

wcginc.com/jobs