



Job Description: Executive Support Specialist

Company: bmp, CPA LLC

Location: North Liberty, IA 52317

Position Overview:

The Executive Support Specialist at bmp, CPA LLC is responsible for ensuring smooth and efficient office operations. This position involves handling office communications, supplies, client processes, and general administrative duties, with a focus on confidentiality, attention to detail, and collaboration. The ideal candidate will provide proactive support to the executive team while maintaining an organized and efficient work environment.

Schedule:

- **Work Hours:** Monday and Wednesday, 9:00 AM – 5:30 PM (specific hours within these time frames)
- **Duration:** January – April
- **Pay Structure:** \$16-\$21/hr with a 2-week review followed by reviews every 30 days for compensation alignment; potential for bonuses.

Key Responsibilities:

- **Mail Management:**
 - Process all incoming mail with precision, ensuring proper sorting, handling, recycling, and efficient management of all correspondence.
- **Errands & Deliveries:**
 - Run errands to the post office to mail or pick up critical tax-related documents and materials, ensuring timely delivery.
- **Package Processing:**
 - Monitor and check the secure drop box daily, collecting and processing packages according to the established procedure manual.
- **Client Relations:**
 - Assist in sending personalized client birthday cards on a semi-weekly basis, ensuring adherence to guidelines outlined in the procedure manual to foster positive client relationships.
 - 1:1 client interaction may be available.
- **Office Supplies Management:**
 - Oversee the management of office supplies, ensuring the timely procurement and availability of necessary resources for the office team to operate efficiently.
- **Email Management:**
 - Process and manage the Info Box emails, forwarding client messages to the appropriate team members.
 - Ensure that SafeSend emails are filed accurately in their designated folders.



- **SafeSend Downloads:**
 - Assist with downloading client documents from SafeSend, including Exchange, Signature, or Organizers, following all necessary procedures to maintain confidentiality.
- **Document Scanning & Organization:**
 - Scan and digitally organize incoming hard-copy tax documents, ensuring all files are properly stored for easy retrieval.
- **Electronic Filing Responsibilities:**
 - Track signed signature forms, ensure proper electronic filing of returns, and maintain electronic filing records following regulations.
- **Client Folder Maintenance:**
 - Assist with maintaining client folders, ensuring accurate file naming conventions, correct file locations, and timely reporting of discrepancies to the Office Coordinator.
- **Monthly and Quarterly Accounting:**
 - Sales tax filing
 - Payroll processing
 - Accounting – profit and loss statement and balance sheet analysis
- **Other duties as assigned.**

Required Skills:

- Strong attention to detail and organizational skills
- Excellent communication and collaboration abilities
- Ability to handle sensitive and confidential information with discretion
- Proficiency in office software and tools
- Ability to follow instructions and work within established procedures

To Apply:

Interested candidates are encouraged to submit a resume and cover letter outlining their qualifications for the role. We look forward to hearing from you!