



Behind every great Consultant is a stellar support team. We are on the lookout for an organised, proactive individual to join our esteemed firm as part of our Tax & Accounting Administration team. As a member of our supportive and dynamic group, including Senior Administrators, Client Experience Assistants, and Administrators, you will play a crucial role in ensuring our clients receive unparalleled service.

Previous experience in a professional services environment is highly regarded, with a background in financial services considered a bonus. What truly matters to us is your proactive attitude, strong organisational skills, and willingness to get stuck in. If you're ready to thrive in a respected firm and play a key role in our continued success, we'd love to hear from you!

What's in it for you?

- 12-month opportunity to make an impact: step into a dynamic support role where you'll be at the heart of the action
- Flexible working: we support a balanced work style, incorporating a blend of office & work from home
- Additional leave: enjoy five additional paid leave days annually
- State of the art Office Space: A modern, relaxed office centrally located on Castlereagh Street, with a tram stop right outside our door
- Motivating team: be part of a forward-thinking and energetic team and advisors, with a supportive leader committed to constant learning and improvement
- Social culture: experience a lively social atmosphere with an engaging calendar of events and activities

Your responsibilities will include:

- Various Personal Assistant administrative tasks including calendar and inbox management
- Administrative preparation, management and distribution of tax documents
- Client invoicing
- Database maintenance including CRM
- ATO liaison and compliance
- Workflow management and preparation of reports
- Provide business services support to keep the office running smoothly — from organising team lunches to keeping supplies stocked, and arranging office maintenance as required.

The full position description is available on the next page

You will be successful because you are:

- A professional administrator with experience in a corporate setting
- Someone with a positive, enthusiastic personality – and a can-do attitude!
- An incredibly organised and detail-oriented individual in a fast-paced environment
- Someone with excellent communication skills, a client centric mindset and the ability to build rapport with clients
- Someone with the ability to build and maintain positive working relationships
- Tech savvy and know your way around the Microsoft Suite – Word, Outlook, Excel and able to adapt to new systems

Interested?

If you're ready to take the next step in your career with a progress and supportive company, we want to

hear from you!

To be eligible, you must be an Australian Citizen/ Permanent Resident, or have full working rights.

Client Experience Assistant

Division:	Client Experience
Department:	Tax & Accounting
Manager/ Team Leader:	Client Experience Manager
Position description review:	July 2025

Purpose

A Client Experience Assistant provides high level support to a specialist Consultant(s) and their client base to ensure that the Consultant(s) can remain focussed on management and service delivery for their client base.

What does success look like for this role?

- Client relationships are maintained via high levels of service and appropriate/timely communication
- The Consultant's time is adequately managed with appointments/meetings/priorities
- Action items from client meetings are undertaken in a timely and complete manner
- Relevant tax related administration and processes are performed accurately and in a timely manner
- Actively contributed to the broader Client Experience – Tax & Accounting team

Responsibilities

Organisation

- Coordinate Consultant's time and exercise judgement on priorities
- Manage communications on behalf of Consultant(s) e.g. emails, mail, calls and voicemail
- Manage and track team and client workflow to ensure lodgement deadlines are achieved

Client and Consultant Support

- Liaise directly with clients via emails and calls
- Attend and support team WIP/client management meetings, including preparation and distribution of meeting reports and materials
- Provide exceptional client service (e.g. meet and greet, listen/identify opportunities to enhance their experience with DPM)
- Coordinate the client appointment booking process (phone, email or online booking system)
- Follow up Consultant(s) post meetings to ensure action items are noted/followed through
- Ensure all internal business requirements are updated and completed post meetings



Business Services

In conjunction with the Office & Reception Lead, assist to coordinate the following, including but not limited to:

- General DPM Sydney office logistics and organisation
- Act as liaison for organisational maintenance/improvement requests
- Onboarding of new employees
- Sydney office events e.g. Social, Mid Year, Xmas, Celebration events
- Office catering and amenities requirements
- Awareness amongst the Sydney team of DPM mandates and updates on relation to health and safety as required

General

- Provide administrative support to Consultants as required, including administrative tasks required to be undertaken on behalf of consultants as requested by relevant teams (e.g Marketing)
- Understand and utilise ATO portal to maintain accurate client data and perform other client service-related tasks as required
- Assist with the requirements to establish new Trusts and Companies and relevant ATO registration requirements
- Actively participate in team meetings and project work within T & A division
- Maintain accurate client data and information
- Identify and communicate opportunities for process improvement to Team Leader – Tax & Accounting
- Provide updates on workflow to Client Experience Manager as requested
- Provide peer/reception cover as required
- Scanning and document management
- Prepare required legislative and/or client correspondence (e.g. ATO correspondence)

Qualifications, Skills & Experience

- Demonstrated experience (5+ years) in a similar position in a professional environment ie. Personal Assistant
- Outstanding organisational skills and a strong attention to detail
- Demonstrated ability to take initiative
- Team player with an ability to share and convey knowledge
- An ability to build relationships with a variety of people
- Advanced co-ordination/administrative skills
- Sound communication skills (written and oral)
- Computer literacy – Xero, Excel, Word (Intermediate - Advanced)

