



DPM is a leading accounting and financial services firm based in Melbourne since 1964, and in Sydney since 2015. Tax & Accounting is a key area of client service delivery at DPM.

But 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 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.

While experience in a professional services environment is a plus, what truly matters to us is your positive, go-getter attitude and organisational skills. If you are ready to thrive in a renowned firm and contribute to our continued success, we would love to hear from you!

## What's in it for you?

Join DPM and experience a rewarding career with a host of benefits designed to support your professional growth and personal well-being

- Flexible working: we support a balanced work style, incorporating a blend of office and work from home
- Additional leave: enjoy five additional paid leave days annually
- State of the art Office Space: work from our brand new, modern office located conveniently on St Kilda Rd, right next to the Anzac Station and tram stop.
- Motivating team: be part of a forward-thinking and energetic team and advisors, with a supportive leader committed to constant learning and improvement
- Health and wellbeing: enjoy free fitness/yoga/pilates classes onsite or simply take part in the wellness events throughout the year
- 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
- Client communication including phone and emails
- ATO liaison and compliance
- Workflow management and preparation of reports

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
- Experienced with XERO and DocuSign (*desirable*)

## Interested?

If you're ready to take the next step in your career with a progressive and supportive company, we want to hear from you! We're reviewing applications as they come in, so don't wait!

To be eligible, you must be an Australian Citizen or PR, or have full working rights.

# Client Experience Assistant

Division:	Client Experience
Department:	Tax & Accounting
Manager/ Team Leader:	Client Experience Manager
Position description review:	August 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 meeting



## 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 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)

