

Client Service Manager Job Position**Katy, TX 77494****Full Time/Heavy Part Time Remote position**

Life is different at Dillon Business Advisors! Make a difference and positively impact the lives of our clients and your new team.

Are you looking for more than hustle and grind? We are a team of 15 members in a financial services firm that provides concierge level service to all aspects of the financial process for our clients. Our firm has cultivated an identity of excellence and trust with our clients and community, so opportunities are available for those looking to grow personally and professionally. We have a proactive approach with our personal and business clients providing guidance throughout the year. We take pride in our thorough knowledge and connection with our clients and have been doing so for 10 years. We offer a great work environment and strive for innovation and exceeding client expectations! We have team members that enjoy working together and with our clients in a collaborative environment. We would like to know how we can help you realize more than you think is possible in your career. We do not do any audit, review or compliance work that requires independence with the firms' clients. We are truly our clients most trusted advisor.

Primary Responsibilities

Our Dillon Business Advisors plans include a full-service, cloud-based solution for small business clients.

- Will work with many of the firm's clients in an outsourced accountant role with a complete cloud accounting system
- Will code client transactions and reconcile client accounts in QuickBooks Online
- Will assist clients with QuickBooks Online as primary business reporting technology
- Will facilitate preparation and processing of client payrolls, W-2s, and 1099s through ADP
- Will prepare and process sales tax reports
- Develop a strong, productive, professional, trusted advisor relationship with assigned clients
- Partner with clients by understanding their business and industry and providing ongoing advice, insights and support

Secondary Responsibilities

Tax –

- Will prepare federal and state income tax returns for individuals, trusts, & businesses
- Will work with OCR software streamlining individual tax preparation within office

Interpersonal/Client Development Skills

- Exhibits time management and organization skills
- Develops entrepreneurial approach to client service and good working relationships with client personnel
- Builds new and existing client relationships and demonstrates basic knowledge of client's businesses
- Maintains contacts with peers, develops network of business contacts
- Develops means of communication to clients and persons responsible for maintaining relationship with clients
- Accepts volunteer positions in community organizations
- Understands firm ethics and demonstrates them consistently

Desired Skills

- Minimum of an Associates or Bachelor's degree in accounting or other related program
- CPA eligible preferred
- Prior experience (2 years) in private/public accounting
- Strong technology skills using Microsoft Office 365 (Word, Excel, PowerPoint, and Outlook at a minimum, more applications preferred)
- Ability to multi-task and to work independently with minimal supervision
- Experience working in a paperless environment strongly preferred
- Strong interpersonal and relationship building skills
- Team player with a positive – 'can do' approach

Work Life Flexibility

Dillon Business Advisors provides team members the ability to be both professionally challenged and with time year-round to be personally involved with family and friends. Our team also enjoys a hybrid remote and in office work environment.

Compensation

Compensation is composed of base pay and bonuses 3 times per year. Other benefits of working with Dillon Business Advisors are 401K with non-discretionary match, profit sharing and cash balance plans, 3 weeks of PTO, health insurance available, technology reimbursement, remote work environment with in-office availability, and collaborating with an awesome team.

Apply Confidentially

If interested in applying for this position, please submit a letter of interest, resume, and salary history to Rachel@DillonAdvisors.com. *Be sure to reference the position in the subject section of the email.
