



# Senior (Sr.) Tax Assistant

*(full-time, regular employment)*

## ABOUT ADVISORNET FINANCIAL

AdvisorNet Financial has been an innovative leader in the financial services industry for over 60 years. We provide the services and support independent financial advisors rely on to operate their firms efficiently and competitively. Over the years we've developed a vast network which allows us to provide our 300+ independent advisors access to the support services and industry partners that advisors in large institutions enjoy without having to be part of a large institution. For more information, please visit us at [www.advisornet.com](http://www.advisornet.com).

You will be a great fit if you enjoy working with people and data in a very dynamic, fast-paced environment. Our group requires people to be friendly, outgoing, and to thrive in an environment working on and in the business at the same time.

## RESPONSIBILITIES

### **Overview:**

The Sr. Tax Administrative Assistant works under the supervision of the Tax Manager, but many of their duties are performed with little or no supervision. Our tax office is fast-paced and is looking for a self-starter. This position is part of a team environment working collaboratively with each other.

### **Key Areas of Responsibilities:**

- Perform data entry from tax source documents to tax software
- Check-in and assembly of tax documents for clients
- Schedule appointments and prepare documentation for client meetings
- Greet clients and assist in answering phones
- File paperwork
- Credit Card processing
- Scan and process tax documents
- Assist in receiving and sorting of tax related mail
- Other tasks that contribute to the function of a tax office

## QUALIFICATIONS

- Previous tax work experience
- High attention to detail
- Excellent organizational skills
- Team player
- Time management skills
- Excellent communication skills both verbally and in writing
- Proficiency in computer programs, such as Microsoft Word and Excel, and contact management systems
- Experience with tax software
- Using office equipment such as copiers and scanners
- Having basic mathematical skills
- Handling sensitive and confidential information properly
- Performing clerical duties
- Willingness to learn new skills and software

**To apply:** Please send your resume to [hr@advisornet.com](mailto:hr@advisornet.com).

*Disclaimer: This job description is only a summary of the typical functions of the job, not an exhaustive or comprehensive list of all possible job responsibilities, tasks, and duties. Responsibilities, tasks, and duties of the jobholder might differ from those outlined in the job description and other duties, as assigned, might be required.*