



Holman Frenia Allison, PC, Certified Public Accountants and Consultants (HFA), is headquartered in Central New Jersey. The firm services a diverse client base within the tri-state area providing highly personalized and comprehensive accounting, audit, tax and business consulting services.

We are looking for a Client Service Associate to work in our Lakewood, NJ office. This position will work for our Audit department.

Provides high quality service by assisting the department members with organizing/processing client information, responding to and anticipating client service requests so we can better service our clients, and continue to provide the high-quality work that we are known for. CSAs will work both internally with our accountants/advisors and externally with clients and will be given the responsibility to learn the cadence and expectations of the service level we need to provide.

This role supports the technical department leadership and acts as a liaison between the client and the firm. The Client Service Associate also serves as specialized support position devoted to the technical department and their unique operational needs. This position would involve a combination of billable and nonbillable time.

Responsibilities

- Work with Engagement binder roll-forward
- Assist with preparation and subsequent receipt of confirmations.
- Proof presentations for proper formatting, grammar and spelling.
- Coordinate transmission of deliverable to client.
- Maintain and update client contact information
- Meet client requests such as providing copies of financial statements, audit reports, tax returns or K-1's.
- Draft client billing invoices for HFA services on a monthly and ad hoc basis.
- Prepare engagement profitability/realization reporting for department leadership.
- Serve as backup to the other client service associates and to the operations department during absences & heavy workload periods.
- Draft non-technical letters to client or client stakeholders, IRS or state taxing authorities, check for proper spelling and grammar.
- Develop relationships with clients and provide excellent customer service.
- Perform accounting, auditing, and consulting duties as needed in engagements and as assigned by supervisory personnel.
- Monitor the status of engagements in the finalization process.

Core Schedule:

- Monday – Friday 8:30-5:00
- In office work location to better facilitate interaction with clients and the technical department's team members. Onsite with clients as needed.
- Seasonal overtime during team's busy seasons, approx. 100-200 hours.
- Exempt, discretionary bonus eligible.
- Expectation of 85% billable services, 15% nonbillable services.

Reporting Structure:

The CSA is a member of the respective technical department, reporting to the department's leadership team.

Knowledge and Skills Requirements:

- Microsoft Office and 365 proficiency (Excel, Word, Outlook, PowerPoint, SharePoint)
- Prior administrative experience within a public accounting firm strongly preferred, and/or experience within a professional services firm.
- Associates Degree in Accounting or Business Administration is required.
- Bachelor's Degree in Business Administration, Finance or related fields is preferred.
- Ability to manage multiple client and internal projects simultaneously without significant oversight.
- Strong attention to detail and ability to represent the firm in a positive light at all times.
- Versatile, and able to problem-solve and provide solutions to new or unique needs.
- Applies business acumen and understanding of the firm's practice areas.