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## Client Services Coordinator

*Operations Department • Full-Time | Hybrid*  
Reports To: Client Services Manager

### WHO WE ARE

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Five Stone Tax Advisers is a faith-based, mission-driven CPA firm built on a simple belief: serve people faithfully, and everything else follows. Our promise to clients is simple too: less tax, more good, delivered by protecting people, relieving their burdens, and pursuing the best possible outcome under the law. We believe excellence honors God, so we hold ourselves to the highest standards of quality, integrity, and disciplined execution in everything we do.

That same spirit shapes how we treat each other. We serve our clients so we can serve our team, building a supportive environment where people are genuinely cared for, not just employed. We want our team members to succeed, in their careers and in their lives, so we encourage learning and growth at every stage, from earning certifications to pursuing advanced degrees.

Generosity is part of who we are: we give freely of our time and resources, including 33% of our annual profits, to bless our community and those in need around the world. Every decision we make, for our clients and for each other, is guided by our core values: People First, Wow Every Client, and Best Possible Outcome.

### POSITION SUMMARY

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The Client Services Coordinator serves as the first point of contact for clients, providing exceptional customer service through efficient communication, problem-solving, and coordination across all departments. This role supports multiple lines of business including Income Tax, Property Tax, and Tax Resolution, ensuring clients receive timely, accurate, and professional responses while maintaining organized, well-documented client records.

The ideal candidate is highly organized, detail-oriented, and thrives in a collaborative environment. They demonstrate a strong understanding of customer relationship management, workflow tools, and communication best practices.

### CORE PURPOSE

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To deliver an exceptional client experience through proactive communication, attention to detail, and seamless coordination between departments.

### YOUR "ONE THING"

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***"Wow the client with quick, clear, and concise communication - every time."***

### CORE RESPONSIBILITIES

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- Serve as the primary point of contact for inbound client inquiries via phone, email, and mail.
- Welcome clients with warmth and professionalism to foster a positive, inviting atmosphere.
- Uphold a polished, business-appropriate appearance to ensure an excellent first impression.
- Manage and route client communications to the appropriate department or team member.
- Maintain accurate and timely documentation in HubSpot, ensuring all client touchpoints are recorded.
- Process all mail and faxes on the same day they are received.
- Coordinate scheduling and administrative support across departments as needed.

- Support client onboarding, file updates, and follow-ups to ensure a seamless experience.
- Monitor service metrics such as call volume, response times, and client satisfaction.
- Contribute to department process improvements and cross-departmental communication.

## GOALS & OBJECTIVES

| Horizon    | Objectives                                                                                                                                                                                                                                                                                                                                                 |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Daily      | Maintain a call abandonment rate below 5% with no refused calls • Respond to client communications within 24 hrs • Process all faxes and mail on the day they are received • Keep HubSpot accurate and up to date for all client communications                                                                                                            |
| Short-Term | Receive at least one positive online client review per month (e.g., Google or NPS) • Become proficient in HubSpot CRM and understand how to best leverage it for client communication • Become proficient in Microsoft Office 365 tools for scheduling and documentation • Develop strong time management and focused work habits to maintain productivity |
| Long-Term  | Build confidence and understanding of property tax procedures and seasonal timeline • Expand knowledge of Five Stone's services across all departments to better support clients • Contribute to cross-departmental collaboration and process efficiency • Demonstrate leadership and ownership in client experience initiatives                           |

## QUALIFICATIONS

- 2+ years of experience in client services, administrative support, or a customer-facing role.
- Proficiency in Microsoft Office 365 and CRM tools (HubSpot preferred).
- Excellent written and verbal communication skills.
- Strong organizational and time management abilities.
- High attention to detail and accuracy in data entry and documentation.
- Ability to manage multiple priorities in a fast-paced environment.
- Professional, positive, and team-oriented attitude.

## OUR CORE VALUES

| People First                                                                                         | Wow Every Client                                                                                                            | Best Possible Outcome                                                                                                          |
|------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| We treat every client with respect, clarity, and care, taking responsibility for those who trust us. | We deliver a world-class experience through preparation, responsiveness, and disciplined execution, every step, every time. | We apply deep knowledge and sound judgment to advocate relentlessly in pursuit of the best possible tax outcome under the law. |

*These values guide every action and decision at our firm. They are not aspirational posters, they are behavioral standards lived daily by every member of our team.*

## WHY FIVE STONE

Five Stone Tax Advisers is an exceptional place to grow your career. We pride ourselves on a culture that prioritizes purpose, flexibility, and professional development.

- **Purpose Beyond Profits.** We donate 33% of our annual profits to local and international charities, offer five company-paid volunteer days each year, and lead regular donation drives.
- **Flexibility and Work-Life Balance.** To prevent industry burnout, we offer remote and hybrid work options, flexible scheduling, and a generous PTO policy that lets you rest and unplug.
- **Financial Security and Career Growth.** We invest in our team through competitive salaries, 401(k) matching, and performance bonuses, and we fully fund CPA and EA certifications, continuing education (CPE) credits, and professional membership fees.
- **Holistic Health and Family Care.** Our benefits include comprehensive health, dental, and vision insurance with HSA options, paid parental leave, gym membership reimbursements, and 100% company-paid life and disability insurance.
- **Strong Team of Professionals.** You will work alongside an elite team of more than 30 specialized CPAs and tax attorneys in a collaborative environment where your contributions directly impact the world for the better.