FiveStone | TAX ADVISERS

Client Services Coordinator

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

WHO WE ARE

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

The Client Services Coordinator is the first point of contact for clients, ensuring they feel heard, informed, and cared for. Through warm, proactive communication and thoughtful problem-solving, this role supports clients across Income Tax, Property Tax, and Tax Resolution, delivering timely, accurate responses and a seamless experience across departments. The role builds lasting client relationships by following up, noticing concerns early, and recognizing when additional Five Stone services could add value and introducing them with confidence to achieve the best possible outcome.

Success in this role comes naturally to a people person who communicates clearly, listens well, and enjoys solving problems. The Client Services Coordinator is highly organized, detail-oriented, and collaborative, with a strong grasp of communication best practices.

CORE PURPOSE

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

YOUR “ONE THING”

> ***“Wow the client with quick, clear, and concise communication - every time.”***

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CORE RESPONSIBILITIES

- 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
- Speak confidently and accurately about all Five Stone services, building trust with clients and prospects.
- Proactively identify opportunities to grow existing client relationships through additional services.
- Support new client conversations and proposals, helping convert interest into signed engagements.

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 • Speak confidently about Five Stone services in every client interaction, looking for natural opportunities to mention additional ways we can help
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 • Build comfort and skill in identifying and raising service expansion opportunities with existing clients

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Horizon	Objectives
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 • Develop into a trusted voice for clients considering additional Five Stone services, supporting firm growth through strong relationships

QUALIFICATIONS

- 2+ years of experience in client services, administrative support, or a customer-facing role.
- Prior sales or client growth experience.
- Proficiency in Microsoft Office 365 and CRM tools (HubSpot preferred).
- Excellent written and verbal communication skills.
- Strong organizational and time management skills, with the ability to manage multiple priorities in a fast-paced environment.
- High attention to detail and accuracy in data entry and documentation.
- Strong problem-solving skills and the confidence to take ownership of resolving client issues.
- 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.

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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 that support the greater Austin area.
- **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.