FiveStone | TAX ADVISERS

Client Success Lead

Income Tax Department • CPA Firm • Full-Time | In-Office
Reports To: Tax Partner

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 Success Lead is the operational backbone of the client experience in our Income Tax Department. This role manages client onboarding, engagement letters, document management, tax return filing logistics, IRS correspondence, and CRM records, so that our income tax professionals can stay focused on advising clients.

The ideal candidate is highly organized, detail-driven, and responsive. They follow precise procedures every time, keep every client record complete and current, and communicate with clients and internal teams clearly and promptly.

WHAT THIS ROLE DOES

Own the administrative side of the income tax client lifecycle: set up new clients, send and track engagement letters, monitor and file signed returns, manage paper filings and certified mail to the IRS, keep HubSpot and SmartVault accurate and up to date, and use AI to streamline client services processes.

YOUR ONE THING

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

This is not a metric. It is a standard. Every email, every call, every deliverable is an opportunity to demonstrate that our clients made the right choice.

CORE RESPONSIBILITIES

Client Onboarding and Engagement Management

- Drive prompt client communication while maintaining flawless CRM records across all active touchpoints.

- Prepare and send engagement letters to clients and follow up on outstanding letters.
- Set up new clients with separate Business, Personal, and Estate accounts, and send access invitations.
- Execute consistent and standardized document workflows, ensuring all engagement letters and client records are accurate, complete, and readily available.
- Forward signed engagement details to the accounting team with complete, detailed information, and close related accounting tasks.
- Create and manage HubSpot deals, update deal and fulfillment stages, and document activity notes.

Tax Return Processing and Filing

- Monitor completed e-signature status daily during the off season and multiple times daily during tax season.
- Send reminders to clients on unsigned returns.
- Electronically file signed returns through ProConnect, resend returns when necessary, and upload signature pages to SmartVault.
- Update ProConnect and HubSpot status once filing is complete.
- Manage rejected e-file returns by preparing paper-filing packages: provide signing and mailing instructions, compile returns on receipt, scan and upload copies, and mail completed packages to the IRS.
- Assemble paper-filed returns to firm standards, ensuring original wet signatures and correct form order.
- Pull IRS transcripts through THS as requested.

IRS Correspondence and Compliance Documentation

- Prepare certified mailings to the IRS and record tax years, filing type, and tracking numbers in HubSpot.
- Manage the certified mail process end to end: post office drop-off, receipt filing, matching IRS return receipts to originals, scanning to SmartVault, and logging IRS receipt dates in HubSpot.
- Distribute BAS-related documents for client signature, track receipt, update HubSpot, and notify the responsible tax professional on completion.
- Process S-Corporation Election Forms (Form 2553), including obtaining wet signatures, maintaining documentation in SmartVault, faxing forms to the IRS, and communicating submission status.
- Fax signed documentation to the IRS when required.

Records, Reporting, and Client Requests

- Keep client activity current in HubSpot and SmartVault, and save all mailing records and supporting documentation to the client file.
- Add requested information to the RFC Spreadsheet.
- Print client letters and mailings to firm standards.
- Send clients copies of their tax returns securely, following firm password protection procedures.

Process Improvement and AI

- Use firm-approved AI tools in daily work to draft client communications, summarize correspondence, organize documents, and reduce manual data entry.
- Leverage firm-provided AI tools to improve and speed up communication, document indexing, and routine administrative tasks, while actively identifying opportunities to streamline departmental workflows.

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- Review all AI-assisted output for accuracy and completeness before it reaches clients or firm systems, following firm data security and confidentiality policies.
- Document new AI-enabled procedures and share them with the Income Tax team.

EXPECTATIONS

Every member of our team is expected to:

- Live and model our Core Values in every interaction: People First, Wow Every Client, Best Possible Outcome.
- Follow firm procedures precisely and consistently, protecting client data and confidentiality at every step.
- Remain engaged and proactively communicate concerns across the twelve key practice areas.
- Own the work from start to finish, following through without reminders.
- Embrace AI and new technology to work smarter, faster, and more accurately.
- Participate in community engagement and service as a representative of the firm.
- Communicate well: clearly, promptly, and with appropriate context.

GOALS & OBJECTIVES

Horizon	Objectives
Daily	Respond to client emails promptly • Monitor ProConnect for signed returns and file them the same day • Keep HubSpot and SmartVault records current • Move engagement letters and IRS mailings forward without delay
Short-Term	Master firm systems and procedures (HubSpot, SmartVault, PandaDoc, ProConnect, THS) • Reduce outstanding engagement letters and unsigned returns • Run tax season filing logistics with zero missed steps • Adopt firm-approved AI tools in daily client services work
Long-Term	Strengthen and document client services processes • Implement AI-assisted workflows that make client services faster and more accurate • Improve onboarding speed and client experience • Grow into a broader leadership role within the Income Tax Department

QUALIFICATIONS

- 3+ years of experience in client services, administrative operations, or office coordination, ideally in a professional services or accounting firm.
- Prior experience in tax or accounting firm operations is a plus but not required. We will train candidates who bring exceptional organization, CRM proficiency, and a dedication to client success in the unique aspects of tax.
- Proficiency with HubSpot (or a similar CRM), SmartVault, PandaDoc, Intuit ProConnect, and Microsoft 365 / Outlook; ability to learn new systems quickly.
- Comfort using generative AI tools to improve speed and quality of work, with sound judgment about client data privacy and a commitment to verifying results.

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- Exceptional attention to detail and the discipline to follow precise procedures every time.
- Strong organization and time management, with the ability to manage high volume during tax season.
- Clear, prompt, and professional written and verbal communication.
- Sound judgment and discretion in handling confidential client and taxpayer information.
- High emotional and social intelligence: warm with clients, collaborative with teammates, and steady under pressure.
- Associate's or Bachelor's degree preferred.

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.

GROWTH & ADVANCEMENT

This role is designed as a development pathway. Team members who demonstrate reliability, ownership, and client excellence will be considered for expanded responsibility and leadership within the Income Tax Department. We invest in people who invest in themselves and in our clients.

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 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 support continuing education and professional development.
- **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.