
Client Services Coordinator

Operations Department • Full-Time | Hybrid

Reports To: Client Services Manager

POSITION SUMMARY

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

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."

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

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

- CPA or EA license in good standing (required).
- Bachelor's degree in Accounting, Finance, or a related field.
- 3+ years of experience preparing and reviewing individual and business tax returns.
- Strong command of federal and state tax codes, regulations, and compliance requirements.
- Excellent written and verbal communication skills—able to translate complex tax concepts for clients.
- High emotional and social intelligence: collaborative, self-aware, and effective under pressure.
- Proficiency with tax preparation and CRM software preferred (e.g., Intuit ProConnect, HubSpot, Truss).

OUR CORE VALUES

People First

We treat every client with respect, clarity, and care, taking responsibility for those who trust us.

Wow Every Client

We deliver a world-class experience through preparation, responsiveness, and disciplined execution, every step, every time.

Best Possible Outcome

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. High performers who demonstrate technical mastery, leadership, and client excellence will be considered for advancement into Tax Manager or Partner-track roles. 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 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.