



**TAX ADMINISTRATIVE ASSISTANT**  
**THOUSAND OAKS, CA**

**LAMIA FINANCIAL GROUP, INC**

[WWW.LAMIAFINANCIAL.COM](http://WWW.LAMIAFINANCIAL.COM)

Lamia Financial Group provides comprehensive tax preparation and advisory services designed to help individuals, businesses, and trusts. We are a collaborative team that values continuous improvement, meticulous attention to detail, and growing strong client relationships. We are seeking a motivated, detail-oriented, and reliable professional to support our growing team.

**Position Summary:**

The Tax Administrative Assistant provides essential clerical and administrative support to the CPA and tax team. This position is responsible for managing the flow of client documents, maintaining incoming files, providing a high level of customer service, and ensuring the smooth operation of the office, particularly during the busy tax filing seasons. The assistant must handle confidential information with discretion and maintain a high level of accuracy and efficiency with little to no supervision.

**Primary Responsibilities include, but are not limited to**

- **Client Communication:**
  - Greet clients in the office, answer phone calls, and make appointments
- **Administrative Support:**
  - Organize, scan, file, copy, print, and perform data entry in various CRM systems
  - Prepare documents for client delivery via mail or electronic delivery
  - Support the tax team's daily functions by performing essential administrative duties
- **Bookkeeping functions:**
  - Prepare invoices, process billing

**Required Qualifications**

- **Technical Proficiency:**
  - Comprehensive knowledge of Microsoft Office Suite (Excel, Word, and Outlook).
  - Strong ability to quickly learn new technology and digital systems
  - Ability to use office equipment such as a copier, scanner, and 10-key adding machine
- **Experience:** Prior experience with tax forms and/or working in a tax preparation office is preferred
  - Familiarity with Lacerte software is beneficial



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- **Communication:** Excellent Verbal and written communication skills for professional interaction with clients
- **Core Competencies:** Demonstrated ability to be highly organized, detail-oriented, capable of handling confidential information with integrity, and a collaborative team-oriented approach. Ability to operate efficiently, prioritize outstanding tasks to effectively handle urgent matters in a fast-paced environment with a high volume of activity
- Ability to work extended hours during peak tax season

**Salary/ Benefits/Schedule**

- This is a non-exempt position that will be compensated on an hourly basis and will be eligible for overtime. The hourly rate will be commensurate with experience. (Range: \$22-26/hr)
- *Full-time* hours during the busy tax season, *February-April*, with possible weekend and/or overtime
- *Flexible part-time* hours during the off-season, *May-January*, 16-28 hours per week on regular work days Monday-Friday
- Eligible for Cost of Living increases
- Eligible for 401K participation with 3% employer contribution after 1 year employment
- Major holidays falling on regularly scheduled work days are paid
- Includes California mandated paid sick leave
- This position will be located at Lamia Financial Group, Inc., Thousand Oaks, CA

**Please send Resume and Cover Letter to [info@lamiafinancial.com](mailto:info@lamiafinancial.com)**

*This job description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities that are required of this position.*