

Administrative Assistant, Tax

SB Partners LLP is a full-service Chartered Professional Public Accounting firm located in Burlington, Ontario. For over 45 years, SB Partners has served a diverse set of clients and is one of the leading independent CPA firms in the GTA. Our primary client base is entrepreneurial, owner-managed businesses, high net-wealth, corporate subsidiaries and not-for-profit organizations.

Enjoy the rewards and possibilities of working with a team of dedicated, values-driven colleagues who support you and celebrate your accomplishments. Your role will be integral in making a difference in the lives of the team and your clients, along with creating a positive impact in the community.

The Tax group at SB Partners LLP is expanding. We are seeking a dynamic, smart, and service-oriented Administrative Assistant to join our team. Please contact Farah Zafar, Director, Human Resources at fzafar@sbpartners.ca if you are interested in this position.

Purpose of the Position

As an Administrative Assistant, Tax, you will focus on leveraging your administrative skills and basic knowledge of accounting principles in supporting the entire Tax Department to facilitate the efficient operation of the department. The role will involve developing and maintaining outstanding client relationships, ensuring the “Ultimate Client Experience” is provided, and showcasing your organizational and leadership qualities.

Key Responsibilities & Duties

- Providing direct administrative support to entire Tax Department
- Printing and assembling various financial documents, corporate tax and other statutory returns including covering letters
- Quality control regarding visual presentation of financial statements
- Conversion of financial statements and other documentation as required into various formats for electronic presentation
- Composing and editing correspondence as required
- Uploading tax projects into CPM
- Billings and WIP administration
- Facilitating the T3 process



- Preparing engagement letters and correspondence
- Facilitating the weekly workflow process
- Finalizing packages for clients
- Setting up CaseWare and Tax Prep files
- E-Filing T2s, T4s & T5s, as required
- Quality management of paper and electronic files such as retrieval, storage and set-up
- General administrative duties including photocopying, scanning and mass mailings
- Assistance to other administrative team members, as required
- Providing assistance with reception relief, as required
- Providing assistance during periods of team member vacations, illnesses and other absenteeism
- Adhering to the firm's Mission, Vision and Values philosophy
- Additional duties, as assigned

Academic Qualifications

- College diploma from Administrative/Executive Assistant program preferred

Work Experience and Skills

- Public professional accounting firm experience preferred
- Proficient in MS Office computer programs (Word, Excel, Outlook)
- Ability to prioritize workload and the flexibility to manage multiple tasks in a fast-paced environment
- Excellent communication, interpersonal and organizational skills
- Highly organized with fine attention to detail
- Strong work ethic and ability to work in an environment requiring discretion and confidentiality
- Capability working with clients in a professional and confidential manner
- Reception experience considered an asset

SB Partners LLP is an inclusive employer dedicated to building a diverse workforce. We encourage applications from all qualified candidates and will accommodate applicants' needs under the respective provincial human



rights codes throughout all stages of the recruitment and selection process. Please advise Human Resources to ensure your accessibility needs are accommodated throughout this process. Information received relating to accommodation will be addressed confidentially.

We thank all applicants in advance for their interest, however, only those candidates selected for an interview will be contacted.