

Position: Client Relationship Manager

Company Overview: Tax Advisors Group LLC (“TAG”) specializes in Texas business personal property tax consulting. We are committed to providing the highest standard of customized tax consulting and client service in the industry. Our trademarked TAG It™ method of valuation and tax processing is unique in the industry and sets TAG apart from other firms offering tax consulting services in Texas.

Job Description: Client Relationship Managers (CRMs) provide excellent customer service to internal and external clients by efficiently delivering effective reports and timely responses to all day-to-day communication. CRMs are responsible for updating and maintaining the client service team calendar to ensure all internal and external deadlines are met timely; and for maintaining administrative projects as necessary, and for providing support for other operations and consulting functions as needed. CRMs report to the Client Service Manager.

DUTIES:

- Handle day-to-day client communications and coordinate questions and/or requests between Consultants and Clients via phone and email
- Maintain client service team calendar and client appointments daily
- Organize setup of new clients and lead new client integration calls and associated documentation
- Collect and organize new client data to provide to assigned consultant(s)
- Coordinate and manage annual data collection/requests for rendition filing season
- Manage tax accrual process including review and distribution to clients
- Track and organize client data and documents required for administrative hearings
- Oversee, review, and track tax savings reports for each assigned client
- Quickly communicate client needs and/or expectations to Client Service Manager and other Executive team members as necessary
- Track client tax bills and communicate urgent matters or special needs to Client Service Manager, consultants, clients, or other TAG personnel as needed
- Coordinate all client site inspections related to Appraisal District tours, Fee appraisals, and any other site inspections as needed
- Provide Operations support for clients utilizing the external client portal site managed by TAG
- Maintain and update all client contact information in TAG software systems for each assigned client
- Maintain and coordinate Appointment of Agent matters as needed
- Assist TAG personnel and clients on special projects as needed
- Provide support to Operations and Consulting teams as needed throughout the practice including mail, scanning, printing, and organizing documents

Requirements

- 2-4 years of property tax experience (college degree preferred)
- Strong verbal and written communication skills – this position will be responsible for answering the telephone and sending emails both internally and to clients
- Must be well organized and maintain a neat work area at all times

- Ability to multi-task and work independently – this position will be responsible for dealing with large volumes of requests along with daily duties.
- Must be able to take on multiple tasks while still maintaining accuracy and attention to detail
- Strong Microsoft Excel skills (using formulas, pivot tables, removing duplicates, conditional formatting, and converting data from txt files into Excel files)

Compensation

- Salary commensurate with experience
- Performance-based incentive bonuses of up to 10% of base salary
- Winter closing for approximately two weeks the end of December and beginning of January each year during the Christmas and New Year's holidays
- PTO time awarded based on years of employment (prorated 1st year based on start date)
- Medical, Dental, Vision, Life and Disability Insurance; Employer contributes up to \$550 for medical and dental premiums
- Other bonus opportunities and benefits may apply

Please send resume with application.