



Client Services Officer

Location

Ingham

About Us

At Carey Group, we are dedicated to becoming the leading Financial Advisory Firm in Regional Queensland. Since 1951, we have transformed from a small accounting firm in Ingham into a multi-disciplinary company with over 95 professionals across five locations—Townsville, Ingham, Cairns, Malanda, and Brisbane. Our comprehensive service offerings include Financial Advice, Self-Managed Superannuation, Bookkeeping, Auditing and Business Advisory.

Our Vision

To support our clients' goals with a full-service offering, grounded in family values of care and support, performance focus, and client-centric service.

Purpose of the Role

As a Client Services Officer, you will provide essential administrative and office support to our team, ensuring the delivery of high-quality financial services to our clients. Your attention to detail and commitment to productivity will be crucial in maintaining compliance and enhancing the client experience.

Key Responsibilities:

- Provide administrative support across various business areas, including:
 - Billing and receipting
 - Client engagement and financial packaging
 - Database maintenance and return lodgements
 - SMSF commencements and administration
- Collaborate with Partners and team members to complete work assignments efficiently.
- Maintain effective client relationships through timely responses and positive interactions.
- Assist in reviewing and developing administrative procedures.
- Perform accounting support tasks, including:
 - Client management on XERO Practice Manager
 - Compiling and finalizing client financial packages
 - Preparing correspondence related to client ATO matters
- Maintain an accurate time costing diary.



- Provide reception relief as needed.
- Undertake additional duties as directed.

Key Selection Criteria

Essential:

- Previous experience in an administration role.
- Professional presentation and proficient in Microsoft Office Suite.
- Strong problem-solving skills with a continuous improvement mindset.
- Commitment to customer service and understanding of client confidentiality.
- Exceptional attention to detail and strong communication skills.
- Ability to work both autonomously and collaboratively in a high-performing team.
- Adaptability to change and a solution-focused approach.
- Strong organizational skills with proven ability to prioritize and meet deadlines.

Desirable:

- Experience with accounting software (Xero XPM and ATO Portal).
- Familiarity with systems and databases.
- Commitment to continuous professional development.

Why Join Us?

At Carey Group, we prioritize creating a safe and respectful workplace for all employees. We value diversity and are committed to equal opportunity. Join us to further your career while contributing to a team dedicated to client success.

How to Apply

If you are ready to take on this rewarding role, please submit your resume and cover letter outlining your relevant experience to careers@careygroup.com.au.

Carey Group is an equal opportunity employer. We encourage applications from all qualified candidates.