

JOB DESCRIPTION

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| Job title: | Administrator / Personal Assistant |
| Responsible to: | Partners |
| Leech & Partners Mission & Key Goal: | <p>Our mission is to provide solutions, not products, and to provide answers, not information.</p> <p>Our 4 strategic pillars create a framework of growth. Our pillars are:</p> <ul style="list-style-type: none"> • People: Growing a world class team • Technology: Leverage modern technology for better outcomes • Business: Balancing business returns & stakeholder wellbeing • Clients: A long-term ally in business <p>Build strong, lasting customer relationships that foster loyalty and repeat business. Understand our client's needs, fears and goals. Establish quality personal connections between the Leech & Partners team and clients. Tailor services to clients to help them meet their objectives.</p> |

Key Relationships

The position reports to the Partners, working closely with the administration team leader and wider administration team. The Administrator will develop strong working relationships with clients, other stakeholders, suppliers, and the team.

Key Result Areas

| Key Responsibilities: | Jobholder Is Successful When: |
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| 1. Personal Assistance & Administration <ul style="list-style-type: none"> • Personal Assistant to a number of Christchurch Partners; including, assisting with correspondence, PowerPoint presentations, and any adhoc administrative tasks. • Support Partners and accounting team with client correspondence, finalising letters, posting and / or emailing of accounts or other documents, and general typing. • New client setups and maintenance within our Practice Management software, and maintenance of other accounting software as required. | <ul style="list-style-type: none"> • The accounting team and Partners feel supported with the level of support, with positive feedback received. • Goes the extra mile to support all guests to the office, and / or over the phone with positive feedback received. • A friendly positive manner, supporting the wider team. • All tasks are completed within agreed timeframe, with good attention to detail. |

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| <ul style="list-style-type: none"> • Complete simple data processing in Excel, to prepare budget and cash flow projections from information supplied. • Keep up to date with new systems and identify ways to best support the accounting team using these. • Assist with organising and hosting of client functions. • Complete and send finals and efile tax returns once signed in a timely manner. • Review and compare letters with tax returns and accounts, analysing information to ensure details are accurate. • AML – assess new clients set ups and undertake AML compliance as required. • Support Accounting team with IRD correspondence and maintenance, such as client linking and IRD number applications. • Assist with Company incorporations and document maintenance, including filing Company Annual Returns. • Provide professional customer service, answering phones and supporting with queries or connecting them with appropriate person. • Provide exceptional experience to all clients, trades people, and couriers who enter the building. Communicate any health and safety requirements, prepare coffee / tea and inform team member of their arrival. | <ul style="list-style-type: none"> • A “guru” in accounting systems, with the role growing to take on more administrative support from the accounting team. • Systems and data are true and correct. |
| 2. Teamwork <ul style="list-style-type: none"> • Collaborate with wider administration team, learning one another’s tasks to provide additional support to each other. | <ul style="list-style-type: none"> • Administration team are united in their approach, with positive feedback from others. |

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| <ul style="list-style-type: none"> • Identify process improvements, continuously striving for ways to provide exceptional level of support to the wider team. • Create a positive team atmosphere, including team inclusiveness, stimulating involvement, encouraging shared respect, and demonstrate Leech & Partners values. • As required, assist with projects that support the strategic direction of the firm, communicating the execution of agreed milestones. | <ul style="list-style-type: none"> • Present a "can do" attitude and culture. • Process efficiencies are implemented, providing a higher level of service to the wider team. • Positive team culture. |
| 3. Personal Development <ul style="list-style-type: none"> • Actively manage personal performance and career planning. Set development plans and participate in the appraisal process, holding mentors to account. • Prepare for and actively participate in meetings to discuss performance, seeking more regular feedback and / or meetings as necessary. • Create personal goals that have a good stretch, and firmly establish how these will be achieved within specified timeframe. • Identify any training or support required to achieve goals that support development plans. | <ul style="list-style-type: none"> • Regular conversations are had, aligning actions and behaviours with Leech & Partners values and goals. • Understand the need to develop professionally and technically to meet the needs of clients, keeping up to date with any changes and market trends. • Areas for improvement is acknowledged and plans in place to remedy. |
| 4. Other Duties, Health & Safety, and Leech & Partners Policies <ul style="list-style-type: none"> • Duties are not limited to those specified, so further tasks may be assigned on a project or ongoing basis. • Ensure that all Health and Safety requirements as outlined in the Health and Safety policy are complied with. • Ensure all Leech & Partners policies are complied with. | <ul style="list-style-type: none"> • A proactive flexible approach is undertaken to achieve Leech & Partners business objectives. • Awareness of Health and Safety requirements and procedures. • Awareness and compliance with all Leech & Partners policies. |

Person Specification

Knowledge / Experience

- Demonstratable experience in a customer facing role, desirably within professional service industry.
- Microsoft Suite
- Experience in accounting systems (desirable)

Key Skills / Attributes / Job Specific Competencies

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| Communication | <ul style="list-style-type: none"> • Develop strong written and verbal communication skills, including the ability to change tone with different clients and team members. Self-review work, including grammar. • Good attention to detail. • Participate in team discussions and trainings, providing personal views. |
| Problem Solving | <ul style="list-style-type: none"> • Apply knowledge practically. • Have a sense of curiosity when taking on new challenges. • Maintain an open mind and logical approach to different work situations. • Remain calm in problem solving situations and contribute to solutions logically with determination to achieve a result. • Understand the appropriate point at which to seek assistance. |
| Organisation | <ul style="list-style-type: none"> • Multitask while remaining professional. • Understand the importance of priorities and can prioritise. • Effectively manage workflow and report to managers as necessary, including if any concerns. • Work under pressure at busy times and going above and beyond at times. |
| Professionalism | <ul style="list-style-type: none"> • Behave in a professional way in front of clients and business relationships. • Understand the effect behaviours and approach of day-to-day work has on others. • Approachable and listens to other opinions objectively. • Take on feedback constructively. |

Acceptance of Job Description

From time to time, it may be necessary to consider changes in the job description in response to the changing nature of our work environment – including technological requirements or statutory changes.

Approved by:

Employee Name

Job Title

Signature

Date

Approved by:

Name

Job Title

Signature

Date
