



Job Title: Assurance Sr Coordinator
Department: Assurance
Office: Louisville Office
Reports to: IST Assurance Manager/Department Leader
Status: Full-time, Non-Exempt
Last updated: October 2021

Summary of Responsibilities:

Advanced administrative and organizational skills. Able to prioritize and meet imposed deadlines in a timely manner. Strong project management skills. Strong attention to detail as it relates to administrative assurance processes and related office projects. Ability to collaborate and work in a team environment. Able to work with minimal supervision. Willing and able to assist with all related office duties as needed.

Essential Functions:

- Assist in prioritizing and managing daily work-flow, meeting imposed deadlines in a timely manner. Coordinate and communicate with the IST Assurance Manager as needed.
- Participate in meetings with Manager to discuss challenges and successes.
- Preparation, printing and/or binding of client deliverables. Including, but not limited to: engagement letters, SAS114's, financial statements, proposals and other documents as deemed necessary (MCM will provide training).
- Participation in IST quality checks (receive quality checks as well as performing quality checks).
- Track and reconcile all work requests using software programs to ensure all work is completed in a timely manner.
- Day to day office duties (i.e., preparing labels and mailing envelopes, light data entry).
- Follow Best Practices for all job functions and encourage others to do the same.
- Participation in team meetings and team building events.
- Prioritize, understand and manage multiple assigned projects simultaneously.
- Other duties including:
 - process incoming/outgoing USPS mail and overnight packages
 - stocking soda machines and printers/copier
 - maintaining kitchens
 - assist in set up of meetings, ordering or picking up food as needed
 - maintain conference rooms
 - backup coverage for receptionist
 - local hand deliveries as requested
- Willingness to travel to other offices as required for training and/or coverage (5% of schedule may require regional travel).



In addition to the items mentioned above, Senior Coordinator responsibilities include:

- Proficiency in all aspects of the IST Coordinator role, including necessary software.
- Ability to process client deliverable with minimal errors.
- Ability to train entry level team members on processes and procedures.
- Familiarity with Tech Reviews, Prostaff Scheduling, 30/55/60-day Binder completions, Assurance licenses, etc.
- Ability to manage IST work log without Manager instruction.
- Ability to manage special projects independently.
- Make informed decisions with little to no Manager guidance.
- Develop a strong and efficient work ethic.
- Willingness to obtain Notary or other certifications as needed for team success.

Education, Experience, and Skills:

- Relevant work experience in CPA Firm (a plus, but not required).
- Able to multi-task and work in a high volume, fast paced team environment.
- Able to prioritize and meet deadlines in a timely manner.
- Intermediate to Proficient in Adobe Acrobat & Microsoft Office (including Word, Excel and Outlook).
- Helpful but not required software skills: Practice Management, Engagement, and Microsoft Teams.

Expectations:

- Dependable and flexible with work schedule demands.
- Respect and earn the respect of fellow team members.
- Take ownership of identified processes and responsibilities.
- Keep open communications with Manager, Department Leader and Team Members .
- Perform work with confidence and pride, follow through to completion.
- Make informed decisions - discuss with Manager when needed.
- Work in a safe, clean and employee friendly atmosphere.
- Work towards a professional development plan.
- Willingness to assist/support other departments or offices as needed.
- Knowledge of processes and software used in department.
- Provide support that will allow our Partners, Principals, Managers and fellow team members to be successful.

Working Conditions:

- Ability to stand or sit for long periods of time



- Periodic evening and/or weekend work
- Occasional heavy lifting
- Minimal hazards
- General office conditions

We are committed to providing equal employment opportunities to all employees and applicants without regard to race, ethnicity, religion, color, sex (including childbirth, nursing and related medical conditions), gender, gender identity or expression, sexual orientation, national origin, ancestry, citizenship status, uniform service member and veteran status, marital status, pregnancy, age, protected medical condition, genetic information, disability, or any other protected status in accordance with all applicable federal, state and local laws.

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