

Client Engagement Coordinator

Public Accounting Firm

Build a career that fits your life.

We are looking for a **Client Engagement Coordinator** to join our public accounting team. This is a great opportunity for someone who has experience working in a public accounting firm, understands what goes into a year-end or personal tax file, and has decided that **file preparation isn't the part of accounting they enjoy most.**

If you like organization, client communication, keeping things moving, and making sure everyone has what they need to get their work done, this could be the role for you.

The Role

The Client Engagement Coordinator is responsible for **chasing, receiving, organizing and reviewing information from clients** so that our accounting and tax preparers receive a complete, well-organized package of information to prepare year-end files and personal tax returns.

You'll be the person making sure things don't get stuck because we're waiting for one missing bank statement, investment slip, confirmation or answer from a client.

You will also provide general administrative support to the firm, including front desk coverage and assisting with day-to-day office needs.

What You'll Do

Client Engagement & File Coordination

- Contact clients to request outstanding information required for year-end and personal tax files
- Follow up regularly on outstanding items and keep files moving
- Review information received from clients for completeness and identifying missing or unusual items
- Organize documents and information as it is received so that files are ready for the preparer
- Maintain organized checklists and tracking systems for outstanding information
- Communicate with preparers regarding missing information, client responses and potential issues

- Communicate with the Canada Revenue Agency (CRA) on routine administrative matters, including obtaining information, following up on requests, confirming account information and assisting with correspondence
- Answer routine client questions and know when an issue needs to be passed along to the preparer
- Help ensure files are complete and ready to go before they reach the preparer
- Follow up with clients throughout the busy season to keep work flowing and deadlines on track

Administrative Support

- Provide reception/front desk relief as required
- Answer phones and greet clients
- Assist with general office administration
- Assist with electronic and paper filing
- Provide administrative support to the accounting team and partners as needed
- Assist with other office and organizational tasks

What We're Looking For

The ideal candidate will have:

- **Previous experience in a public accounting firm — highly valued**
- An understanding of what information is required to complete personal tax returns and year-end files
- Strong organizational and follow-up skills
- Excellent attention to detail
- The ability to manage multiple files and competing priorities
- Strong written and verbal communication skills
- Confidence communicating with clients and asking for information
- The ability to recognize when something is missing, incomplete or doesn't make sense
- A professional and friendly approach to client service

- Strong computer skills and the ability to learn accounting and document-management software

An Ideal Background

You may be exactly who we're looking for if you've previously worked in a public accounting firm preparing files but realized that you don't want to spend your career preparing files.

Maybe you enjoyed the accounting environment, understood the work and liked working with clients and the team — but found that **organization, communication and keeping things moving** are more your strength than preparing financial statements or tax returns all day.

This role allows you to use that accounting knowledge **without being responsible for completing the accounting or tax work itself.**

What We Offer

- A role that makes use of your accounting firm experience without requiring you to prepare files
- A varied position combining client communication, organization and administration
- A supportive team environment
- Competitive compensation
- Benefits
- Minimal overtime compared with many public accounting firms
- A busy-season environment where your organizational skills make a real difference
- The opportunity for a **stable, long-term role without pressure to move into a preparer or management position**

The Person We're Looking For

We're looking for someone who is **organized, persistent and not afraid to engage with clients.**

You will need to be comfortable sending the second email, making the follow-up call, and asking a client, *"We're still missing three things from you — can you get those to us?"*

You don't need to be the person who wants to do the accounting work. **You need to be the person who makes sure the person doing the accounting work has everything they need.**

To apply, please send your resume to info@brucemonahan.ca