



Title: Client Service Liaison
Rate Range: \$26.44 - \$33.65
FLSA: Non-Exempt
Parttime or Fulltime: Either

Who We Are

The culture at SDK (Schechter Dokken Kanter) is evident the minute you walk in the door. We believe in teamwork and in treating each other with care and respect. This philosophy, in turn, is how we aspire to work with our clients. We have an open-door policy and believe in every member of our team working with clients. It is this nurturing of employees and clients that sets us apart and is clearly stated in the firm's mission; To help our clients and people maximize their business and personal potential.

SDK is a 70 person CPA firm located in downtown Minneapolis. SDK was awarded the MN Top Workplaces designation the last two years.

Summary

This position supports the Employee Benefits department in administering and consulting on a variety of retirement plans. Please note: this position is focused on retirement plans and does not involve any HR work related to benefits such as health or dental plans. This position can be part-time or full-time (20-40 hours per week) based on the applicant's preference, but the schedule must be set once a decision is made. Benefits eligibility begins at 25 hours per week.

What you'll do every day...

- Work with clients to obtain information needed for year-end reporting
- Ensure completed client paperwork is complete and accurate
- Respond to routine client questions
- Assist in reconciliation of plans using Excel
- Preparation of plan filings including Form 1099-R, 5500 & 8955-SSA
- Support team members with daily tasks as needed

What you bring to the table...

- Ability to work primarily in the office with up to one day a week at home after training period
- 2 +years of experience providing professional client services in a business-to-business environment required
 - Experience must involve working with business professionals, not general public customer service, hospitality, or retail settings
- Either a two-year degree or a bachelor's degree
- Excellent written and verbal communication skills
- Proficiency with Microsoft Excel, Word and Outlook
- Experience with 401(k) plans a bonus but we are willing to train



- Ability to establish relationships with clients quickly
- Outgoing, confident, and professional
- Ability to independently organize, plan and control workload

What we bring to the table...

Benefits of Working at SDK CPA:

- Medical, Dental, Short-term Leave, Long Term Leave insurance
- 401k retirement plan
- Paid Holidays
- Flexible Spending accounts
- Internal and external Training/CPE Support
- Positive environment
- Approachable, friendly leadership
- Professional networking opportunities
- Free membership to onsite fitness center
- Close to all the downtown sports facilities

Is This You?

If reading through this excites you and you are ready to learn more, let's chat!

If you are ready to apply, you can email a cover letter and resume to HR Director Tiffany Hand thand@sdkcpa.com

You can also learn more about your future career with SDK and by visiting our careers page and viewing our recruitment video at sdkcpa.com/careers.

SDK CPAs is an EEO/AA employer.