



FIVE STONE

Tax Advisers

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Tax Resolution Case Administrator

Department: Tax Resolution

Reports To: Tax Resolution Manager or Director

Employment Type: Full-Time | Hybrid

Position Summary

The Tax Resolution Case Administrator provides critical administrative and client service support to the Tax Resolution team to help achieve the best possible outcomes for clients' cases. This position plays an essential role in coordinating documentation, preparing IRS and state submittals, maintaining detailed records, and ensuring clients receive clear, professional, and timely communication throughout the resolution process.

The ideal candidate is detail-oriented, proactive, and excels in managing multiple priorities in a fast-paced environment. They possess strong written and verbal communication skills, understand tax documentation and processes, and take pride in supporting both clients and team members with excellence.

Core Purpose

To provide world-class administrative and client service support that enables the Tax Resolution team to deliver successful outcomes while maintaining exceptional client care.

Your "One Thing"

Wow the client by ensuring every case is handled with accuracy, professionalism, and quick, clear, and concise communication.

Core Responsibilities

- Support the Case Managers by preparing, compiling, and organizing all required documentation for case submissions.
- Maintain detailed and accurate case files, ensuring all client information, IRS correspondence, and communications are properly documented in the CRM system.
- Assist with financial analysis of individual and business tax documentation for resolution submittals.
- Prepare and process IRS forms, cover letters, and supporting materials for case resolution.
- Monitor and track case progress, deadlines, and deliverables to ensure timeliness and compliance.
- Communicate proactively with clients regarding case status, next steps, and documentation needs.
- Collaborate cross-departmentally to ensure seamless client experience and workflow efficiency.
- Uphold Five Stone's standards of confidentiality, accuracy, and client satisfaction in all interactions.
- Contribute to continuous improvement of processes and documentation within the department.



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Daily Expectations

- Respond to all client communications within 24 business hours.
- Maintain up-to-date and organized client files in the CRM.
- Process IRS and state correspondence the same day it is received.
- Demonstrate accuracy and efficiency in preparing case submittals and reports.
- Support daily case management operations and meet productivity goals.

Short-Term Goals

- Increase proficiency with internal systems, including CRM and case management software.
- Learn the fundamentals of IRS procedures, forms, and documentation for resolution cases.
- Receive at least one positive client review per quarter related to communication or responsiveness.
- Develop strong organizational habits and maintain a lean, transparent workspace.
- Build collaboration with Case Managers and ensure consistent communication flow.

Long-Term Objectives

- Develop advanced understanding of IRS processes, the Internal Revenue Manual, and relevant tax codes.
- Strengthen ability to identify and anticipate documentation needs for complex cases.
- Support process improvement initiatives that enhance efficiency and client experience.
- Contribute to the achievement of departmental KPIs related to resolution success and client satisfaction.
- Exhibit leadership in ownership mentality, problem-solving, and proactive case management.

Qualifications

- Bachelor's degree in Accounting, Finance, Business Administration, or related field preferred.
- 2+ years of experience in administrative or client service support; tax, legal, or financial experience a plus.
- Familiarity with IRS procedures, tax forms, or the Internal Revenue Manual preferred.
- Excellent written and verbal communication skills.
- Proficiency in Microsoft Office 365 and CRM tools.
- Strong attention to detail, organization, and time management skills.
- Ability to work independently and collaboratively within a team environment.
- Professional demeanor with a client-centered approach.

Core Values

Effectiveness • Professionalism • Selflessness • Commitment • Growth

These values guide every interaction and decision at Five Stone. They are not just what we do — they define who we are.