



Example of Account Assistant Job Description

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Our company is growing rapidly and is hiring for an account assistant. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for account assistant

- Consistently reliable and is a team player
- Manage Client's budget and provides clear, accurate reporting
- Active and enthusiastic participant in agency trainings
- Contribute when asked and steps up to do whatever it takes to get the job done and win
- Be prepared for other tasks as you may be assigned
- Monitor the progress of on-going matters
- Work with each National Client Manager (6 currently) to help reduce collection days by developing a strategy for each client and implementing these Account Receivable (AR) protocols
- Liaise with NCG managers to engage in solutions when clients have issues with invoices or questions
- Coordinate with PSI Corporate Office (Chicago) or other Upper Level Managers' (ULMs) collection professionals via email and phone calls and provide updates on clients' collection efforts
- Conduct "Client Satisfaction Calls" to assess client loyalty and use internal database to track and record progress (work to be directed by each NCG Manager)

Qualifications for account assistant

- Proven ability to work well with others in a team environment, to work independently
- Consistently build knowledge of the Equipment Finance Industry

- Ideal candidate should have experience working in a customer service and team environment
- BS/BA required preferably in Finance, Accounting, or related discipline a plus
- 6 months – 1 year related work experience preferred in a customer service and team environment