Personal Assistant to the Principal & Head of Office – Client Relations and Office Coordination - Job description

Steiner Tax Consultants Pty Ltd · Hout Bay, Cape Town

Full-time · Permanent · On-site · Reports to the Principal and the Head of Office · Salary ZAR 22 000 – 28 000 per month depending on experience – the agreed salary applies from the first day · Start: as soon as possible; notice periods are accommodated

Purpose of the role

Steiner Tax Consultants is a tax and accounting practice of about twenty people in Hout Bay, advising investors, entrepreneurs and medical professionals with interests in both South Africa and Germany. The Personal Assistant is the face and voice of the firm: first point of contact for clients by phone, email and at the office, keeper of their deadlines and documents, and the person who makes sure the office simply works. The role takes everything off the Principal's and the Head of Office's desks that does not need their professional expertise, including recruitment. This is not a reception job and not a job for someone who waits for instructions: after onboarding, you organise your own work, decide the small things yourself and bring the big things to us with a proposal.

External communication and clients

- Switchboard: take calls, classify the request, organise and follow up on call-backs
- Monitor the central inbox: answer, or forward to the right person with context
- Welcome and look after clients at the office, prepare meeting rooms
- Lead client communication on deadlines, missing documents and appointments actively, not just reactively
- Set up new clients (master data, powers of attorney, engagement letter, POPIA consent), send onboarding documents
- Follow-up register: track promises made to clients until they are kept
- Answer standard queries (What do you need from me? Where do we stand?) independently using text modules

Deadlines and procedures

- Maintain the deadline calendar (SARS, CIPC, German filing dates, internal deadlines) and remind the professional staff in good time
- Request and chase missing documents from clients
- The firm's own compliance calendar: annual returns, insurance, licences, memberships (SAIT, SAIPA), domain and software renewals
- Maintain internal process documentation: who does what, where things are, how a standard case runs

Office and suppliers

- Office organisation: equipment, supplies, post, courier, archive
- Manage suppliers: cleaning, IT support, telephony, printers, building management, security, insurance
- Review and renegotiate supplier contracts and terms annually
- Have workstations set up for new staff (access, hardware, keys)

- Health and safety and first aid: responsible persons, equipment, drills (Occupational Health and Safety Act)

Invoicing and administration

- Raise and send client invoices as instructed, keep an eye on receipts, send friendly reminders
- Collect and check the office's incoming invoices and pass them to bookkeeping
- Organise travel, appointments and meetings for the principal
- Keep the digital filing and folder structure clean

Team, culture and people

- Internal events, birthdays, anniversaries, year-end function
- The team's go-to person for anything organisational; "the soul of the office"
- Run recruitment processes: place ads, screen and pre-score applications, coordinate interviews, send rejections and offers
- HR administration: contracts from templates, leave register, sick notes, onboarding and offboarding checklists, personnel files
- Show new staff around on day one and accompany them through the first week

AI and workflows

- Work with the firm's AI tools (text modules, summaries, translations, research) and use them actively in your own area
- Spot recurring tasks and propose how they can be automated or simplified
- Keep the website and LinkedIn page up to date (text, dates, job ads)

Basic professional understanding

- Read legal and tax correspondence (letters from SARS, the German tax office, draft contracts), grasp the point and know whom it concerns
- Know the firm's services well enough to explain to a client what we do and what the next step is
- The firm's notebook: remembers what was discussed and reminds the right people

What we are looking for

Essential

- At least 5 years' experience in a role with client contact and real organisational responsibility – legal secretary, practice manager in a medical practice, client services in a professional firm, guest relations, executive assistant or similar
- Fluent, well-written English; polished, error-free written communication
- Demonstrably self-directed: you have owned an area in a previous role, not merely executed
- Able to read a longer professional or legal text and say in two sentences what it is about and who needs to act
- Confident with office software and cloud tools, and willing to use AI tools day to day
- Discretion with confidential client and personnel information (POPIA)
- Valid driver's licence and own transport – the role includes errands with the firm's vehicle (SARS, bank, clients, suppliers); on site in Hout Bay daily (the role cannot be done remotely)

All work in this office is conducted in English, including with our German clients. German is not required. If you happen to speak it we will find good use for it, but nobody is at a disadvantage without it.

Advantageous

- German language skills
- Experience in a practice, firm or professional-services environment
- Experience with recruitment or HR administration
- Experience with Xero, DATEV or a practice-management system

How success is measured

- Clients reach a competent person at first contact; calls and emails are answered or routed the same day
- No missed client or firm deadline that was in the calendar; missing documents chased until they arrive
- The office runs without the Principal or the Head of Office having to intervene in suppliers, equipment or administration
- Recruitment processes run end to end on the agreed timeline, with every applicant receiving a reply
- After the probation period, no task assignment is needed: you see what needs doing and do it or make sure it is done

What we offer

- Salary of ZAR 22 000 – 28 000 per month depending on experience – the agreed salary applies from the first day
- A permanent position with a 3-month probation period and clear, agreed success criteria
- A discretionary 13th cheque, performance-related, after twelve months' service
- A real say in how the office runs, and an employer who would rather trust you than manage you
- A modern, AI-supported working environment and the chance to shape how a growing practice is organised
- A small, calm team and an office in Hout Bay, away from the city traffic; Monday to Friday, office hours

How to apply

Instead of a CV screening, you complete our online application on www.steiner-taxconsultants.com/en/jobs: a few details about you, questions about your experience, and a short practical part. Shortlisted candidates are invited to a single interview at our office in Hout Bay. We reply to everyone within one week and communicate our decision within two days of the interview.

Your data is handled in line with POPIA and used for this recruitment only. We are an equal-opportunity employer; applications are assessed on experience, skills and fit for the role.

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