



Client Relationship Manager / Office Leader

Sawgrass CPA Advisors is hiring a Client Relationship Manager / Office Leader — a warm, confident, natural leader who can keep the office running smoothly, support a positive culture, and serve as the first point of contact for clients.

This role is perfect for someone who has worked in a smaller professional services firm (CPA, law, medical, wealth management) and wants to return to a boutique, relationship-driven environment with true work-life balance.

You will:

- Oversee office operations
- Support a nurturing, accountable team culture
- Act as a gatekeeper and liaison between clients, the Managing Partner, and the accounting team
- Guide clients through onboarding and engagement
- Build strong, trust-based client relationships

You are: Warm, organized, authoritative without being bossy, an excellent listener, and someone who can confidently say, “Here’s how we’re going to handle this.”

This role reports directly to the Managing Partner.

Client Relationship Manager / Office Leader

Sawgrass CPA Advisors – Southeast Florida *Full-time | In-office | Relationship-driven advisory environment*

About the Role

Sawgrass CPA Advisors is seeking a **Client Relationship Manager / Office Leader** — a natural leader who thrives in a boutique, people-first environment. Think of this role as a blend of mini-CEO/COO, office manager, culture builder, and client relationship champion.

If you've worked in a smaller firm that was later acquired by a large corporate organization — and you've been craving the warmth, autonomy, and appreciation of a family-oriented team again — this is the role that brings you home.

You'll work directly with our Managing Principal, to create a smooth, supportive, and high-trust experience for both clients and our internal team.

What You'll Lead

- **Office Management & Operations** Keep the office running smoothly, anticipate needs, and ensure the team stays organized and on track.
- **Culture & Team Support** Foster a warm, positive, accountable environment where people feel supported, appreciated, and motivated.
- **Client Relationship Leadership** Serve as the first point of contact for clients — greeting, nurturing, listening, and ensuring they feel taken care of from day one.
- **Gatekeeping & Prioritization** Protect Priscilla's time, manage flow, and ensure the right information reaches the right people at the right time.
- **Engagement Coordination** Guide clients through the initial steps of onboarding and engagement, ensuring clarity and confidence.
- **Internal Liaison** Bridge communication between clients, Priscilla, and the accounting team to keep projects moving and relationships strong.

Who You Are

You're the kind of person who walks into a room and instantly makes people feel at ease — but you also know how to take charge when needed. You're warm, grounded, and professional, with the confidence to say, "Here's how we're going to handle this."

Personality Traits That Matter Here:

- Natural leader with calm authority
- Warm, personable, and genuinely caring
- Excellent listener with strong emotional intelligence
- Holds boundaries without being bossy
- Organized, proactive, and steady
- Socially comfortable with clients and professionals
- Accountable and dependable — someone people trust instantly

Experience That Fits

We're looking for someone who has worked in a professional services environment such as:

- A CPA or advisory firm
- A law firm

- A medical or dental practice
- A wealth management or financial advisory office

Experience in a smaller firm that transitioned to a larger corporate environment is a major plus — especially if you've been missing the personal connection and work-life balance that gets lost in big-firm culture.

Why This Role Is Different

Sawgrass CPA Advisors is not a high-volume, grind-it-out accounting firm. We are an advisory-forward, relationship-driven practice where clients are treated like partners and team members are treated like family.

You'll enjoy:

- A stable, supportive environment
- True work-life balance
- A leadership seat at the table
- A role where your voice, ideas, and presence matter
- A team that values kindness, clarity, and collaboration

Reporting Structure

This role reports directly to the Managing Principal, and works closely with the accounting team.

If This Sounds Like You...

You're likely someone who loves being the glue that holds everything together — the person clients trust, the team relies on, and leadership counts on.

If you're ready to step into a role where you can lead with heart, structure, and confidence, we'd love to meet you.

Send your resume to info@SawgrassCPA.com