INTERMEDIATE **ACCOUNTANT**

EMPLOYMENT STATUS ❍ Full Time
REPORTS TO Pod Leader

OVERALL **OBJECTIVE**

To provide accounting support to the Senior Accountants and Assistant Managers while building the skills to manage a client portfolio beginning with individual clients.

KEY DUTIES & **RESPONSIBILITIES**

- Participate in client meetings as & when required.
- Respond to client queries.
- Manage the flow of information between clients and our firm.
- Plans and prioritises work effectively and efficiently
- Prepare Business Activity Statements (BAS's) and Instalment Activity Statements (IAS's).
- Prepare Financial Statements, including Depreciation Schedules for review.
- Prepare Income Tax Returns for review.
- Prepare CGT calculations for review.
- Prepare FBT calculations for review.
- Liaise with the ATO on client matters.
- Data entry.
- Prepare client specific reports as required.
- Provide general accounting and taxation advice to clients.
- Maintain up-to-date knowledge of relevant taxation and other relevant legislation and rulings.
- Research taxation and other relevant legislation for technical manager review.
- Participate in external and internal training as required.
- Identify opportunities for financial planning, loan and insurance leads to our Financial Planning team.
- Ensure that all work is error-free and professionally presented and complies with HTA Advisory procedures and systems.
- Maintain current and accurate files and record and date any actions and detailed file notes.
- Prepare workflow reports for your own client work.
- Prepare cash flow budgets and profit plans for clients.
- Delegation of work as required.
- Review & provide feedback to junior accountants.
- Training of junior team members on processes.
- Other duties as requested.

DELIVERY **OF CORE TASKS**

Training and Development

- Self review of development plan
    - 4 x development sessions held with mentor throughout the year (KPI)
- Completion of ? CPA or CA subjects
    - Due to complete CPA or CA in MONTH YEAR

Core Tasks

- 100% on-time drafting info requests
- 100% on-time drafting activity statements
- Effective management of personal workflow
- Contribute to POD's effective management of client portfolio
- Contribute to POD achieving 85% lodgement with the ATO
- Contribute to POD achieving quarterly job targets
- Produce 95% of work error free that doesn't require rework (KPI)
    - 100% (HPI)

PERFORMANCE **MEASURES**

Billing & Productivity

- Productivity >80%
- Achieve personal billing target of $200,700

Sales Targets

- Introduction of new client referrals to Wealth and Finance Division totalling >$9,000 of revenue

PERSONAL **OBJECTIVES**

- TBD

INDIVIDUAL **QUALITIES**

- Exceptional attention to detail
- Confidence to advise clients based on sound knowledge
- Excellent written and verbal communication skills
- Willingness to learn, show initiative and be a positive “team player”
- Positive and happy attitude
- Highest standard of ethics, confidentiality and professionalism
- Good time management skills

QUALIFICATIONS & **EXPERIENCE**

- Bachelor’s degree in Commerce or Business, specialising in accounting
- Currently completing CPA or CA Qualification
- Good experience in the preparation of Financial Statements and Tax Returns
- Good knowledge of taxation legislation

- Xero Certification and excellent Xero experience
- Excellent use of Word, Excel and Outlook
- Good knowledge of accounting systems
- Demonstrated ability to build rapport with clients

ACCEPTED & AGREED BY

______________________	______________________	Date:
TEAM MEMBER	**DIRECTOR / MANAGER**	