MANAGER

EMPLOYMENT STATUS ❍ Full Time
REPORTS TO Client Leaders

OVERALL **OBJECTIVE**

To oversee a team of professionals while providing excellent business advisory and accounting advice to clients which will enable them to build their businesses.

KEY DUTIES & **RESPONSIBILITIES**

- Manage and administer a $1,000,000 portfolio of clients. Providing technical support, feedback and guidance to team members that work on your clients.
- Set, review, meet and oversee productivity and client budget expectations.
- Ensure all work is accurately billed.
- Providing technical support, feedback and guidance to team members.
- Manage Junior staff to ensure they have sufficient work based on experience and capabilities
- Effective review of junior team members' work
- Manages the expectations of both clients and directors of the firm
- Manages multiple staff
- Sets own budgets on a monthly basis and ensures targets are met
- Effectively manages scheduling of work based on the capacity plan
- Prepare team WIP forecasts and manage workflow
- Sets realistic time frames and ensures they are met
- Review and provide quality assurance on work for Superannuation Funds being provided to clients:
    - Financial Statements
    - Tax Returns
    - Letters and correspondence
    - Pension Letters
- Ability to review and identify technical issues, mitigate risk and consider planning strategies to minimise tax in relation to the following areas of the tax system:
    - Assessable income
    - Allowable deductions
    - Hire purchases/leases
    - Capital Gains Tax (including applicable exemptions and rollovers)
    - Fringe Benefits Tax
    - Division 7A Loans

  - Part IVA
  - Goods & Services Tax
  - Individual Tax Rates
  - Small business CGT Concessions
  - Capital Allowances and Capital Works
  - Company and Trust Losses
  - Dividend Imputation System
  - Trading Stock
  - Superannuation
- Active participation and facilitation in training or discussions around specific technical areas
- An awareness of the following areas to identify, perform research and seek further guidance when required:
  - Indirect taxes
  - Share buybacks
  - Liquidations
  - General value shifting rules
  - Debt/equity ratios
  - Demergers
  - Consolidations
  - International tax and foreign income rules
  - Transfer pricing
  - Buy/sell agreements
- Actively seek new client opportunities outside of the existing client base
- Actively look for opportunities where added value or additional services can be provided to the client
- Maximise profitability within own client base
- Leads meetings and training for the team
- Manages the requirements of multiple team members
- Understands the strengths of each team member and allocates tasks accordingly
- Understands the gaps in knowledge of each team member and ensures necessary training is carried out
- Train and develop your team
- Create an open and supportive team culture
- Regarded as a respected leader within the business
- Other duties as required

PERFORMANCE **MEASURES**

- Effectively manage a client portfolio of <$1,000,000
- Chargeability >72%
- Average Job Margin of >60%
- Achievement of 95% of monthly invoicing budget, measured monthly
- Compliance Job turnaround target <35 days from fee approval or work-in (AE's only) (client portfolio)
- Achievement of >90% monthly job target (client portfolio)
- Achievement of <10% variance Job budgeted hours
- Manages achievement of >85% ATO lodgement target
- Introduction of new client referrals to Wealth and Finance Division totalling >$30,000 of revenue
- Part of the Management team
- System/process Champion

PERSONAL **OBJECTIVES**

- To be determined with Client Leader

INDIVIDUAL **QUALITIES**

- Is able to balance and prioritise conflicting demands while maintaining good judgement
- Outstanding time management skills
- Exceptional attention to detail
- Seeks ways to self improve
- Does not shy away from learning opportunities
- Seeks advice on leading a team and mentoring
- Actively seeks learning opportunities
- Positive influence on the team
- Supports the direction of HTA as a business
- Is able to confront obstacles and find solutions
- Respectful to both team members and clients
- Reliable - keeps promises and commitments
- Highest standard of ethics, confidentiality and professionalism
- Confidence in leading team - is able to make tough decisions
- Maintains accountability and dependability
- Confidence to advise based on sound knowledge
- Remains balanced and rational in all dealings
- Excellent written and verbal communication skills

QUALIFICATIONS & **EXPERIENCE**

- CA or CPA completed
- 10 years experience in public practice
- Tax Agent Registration
- Advanced understanding of the Corporations Act, relevant accounting standards, tax legislation and other research as they relate to the work undertaken
- Advanced knowledge of taxation legislation
- Excellent Xero knowledge
- Excellent use of Office products
- Excellent use of Excel - tables & graphs, formulas, pivot tables, vlookup etc.
- Advanced client relationships and seen as being a trusted advisor
- Advanced knowledge of HTA systems

ACCEPTED & AGREED BY

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