SENIOR **ACCOUNTANT**

EMPLOYMENT STATUS ❍ Full Time
REPORTS TO Pod Leader

OVERALL **OBJECTIVE**

To manage your portfolio of clients

KEY DUTIES & **RESPONSIBILITIES**

- Builds positive client relationships
- Communicates clearly with clients, providing explanations and timeframes where necessary
- Strives to educate clients, ensures they are aware of their obligations to comply with regulations
- Preparation of client budgets and cashflows
- Actively listens to clients and ask questions to gain a greater understanding of their key objectives
- Works with clients to solve complex and sensitive issues
- Provides best position for the client for tax purposes and the risks involved
- Acts proactively, rather than reactively
- Eagerly engages with clients eg. calling a client rather than sending an email when appropriate
- Meet internal deadlines (lodgement list, info requests, budget etc.)
- Meet external deadlines (lodgement due dates, deadlines set by third parties etc.)
- Successful Delegation of Tasks to accountants, graduates and support team
- Strategic workplanning (getting info in, starting and closing jobs etc.)
- Sets, Review & Oversee Productivity
- Set Client Budget Expectations
- Balances quality of work with meeting deadlines
- Monitors progress against budget and timelines, addressing issues in a timely fashion
- Takes effective control of assigned jobs - delegation, time line, budget
- Sets own budgets on a monthly basis and ensures targets are met
- Manages scheduling of work based on the capacity plan
- Goes beyond expectations to ensure projects run smoothly
- Balances quality of work with meeting deadlines
- Identifying, overseeing, and developing existing and potential business opportunities to generate additional revenue for all business units
- Perform and review compliance and value add work when required
- Good working knowledge of:
    - Assessable income
    - Allowable deductions
    - Hire purchases/leases

  - Capital gains tax
  - Fringe benefit tax
  - Division 7A loan issues and risk involved
  - Part IVA
  - GST (including margin scheme, import/exports and overseas transactions)
  - Individual tax rates
  - Small business CGT concessions
  - Capital allowances and capital works
  - Company and trust losses
  - Dividend imputation system
  - Trading stock
  - Superannuation
  - Stamp duty
  - Workcover
  - Payroll Tax
  - Land tax
- Effective review of workpapers, analysis of client data and transactions
- Effective review of Financial Statements and Tax Returns prepared by junior staff
- Ability to provide advice to clients based on their specific situation
- Detailed knowledge of tax office correspondence and procedures
- Good understanding of the Corporations Act and business structures including being able to provide advice to clients as required
- Maintain up-to-date knowledge of relevant taxation and other relevant legislation and rulings
- Participate in both internal and external training sessions and ensures knowledge is transferred to team
- Seeks feedback on performance
- Participates in research and accurate interpretation of taxation and other relevant legislation and rulings for clients when required
- Influences others through leading by example
- Demonstrates HTA values
- Other duties as required.

PERFORMANCE **MEASURES**

- Effectively manage a client portfolio of >$250,000
  - achieve invoicing target
  - achieve job target
  - Compliance Job turnaround target <35 days from fee approval or work-in (AE's only)
  - Achievement of <15% variance Job budgeted hours vs Actual hours
  - Meeting WIP vs Budget for the financial year
- Chargeability >80%
- Delivery of core tasks:
  - Contributes to business achievement of >85% ATO lodgement target
- Training & development:
  - 20 CPD hours
- System/process champion:
  - Keeping on top of product updates and sharing with team
- Introduction of new client referrals to Wealth and Finance Division totalling >$15,000 of revenue
- Sales target TBC

INDIVIDUAL **QUALITIES**

- Outstanding time management skills
- Exceptional attention to detail
- Acknowledges and corrects own mistakes – accountability
- Willingness to learn, adapt, show initiative and be a positive team player and leader
- Positive influence on the team
- Confidence to advise based on sound knowledge
- Excellent written and verbal communication skills
- Highest standard of ethics, confidentiality, and professionalism
- Reliable - keeps promises and commitments
- Respectful to both team members and clients
- Sets and achieves a benchmark of excellence in all work
- Honest in all dealings
- Confident to advise and communicate with clients

QUALIFICATIONS & **EXPERIENCE**

- Bachelor’s degree in Commerce or Business, specialising in accounting
- CA or CPA Qualified
- Xero Certification and excellent Xero Knowledge
- Good understanding of the Corporations Act, relevant accounting standards, tax legislation and other research as they relate to the work undertaken
- Good knowledge of taxation & superannuation legislation
- Strong knowledge of accounting systems
- Excellent Xero knowledge
- Excellent use of Office products
- Excellent use of Excel - tables & graphs, formulas, pivot tables etc.
- Good experience in building client relationships

ACCEPTED & AGREED BY

Date:

TEAM MEMBER **DIRECTOR / MANAGER**