

## ROLE: STAFF ACCOUNTANT / ASSOCIATE

PURPOSE	The Staff Accountant / Associate role is responsible for organizing and managing client assignments and projects including the completion of assigned tasks and project components.
REPORTS TO/ ACCOUNTABILITY	Manager and/or Partner
KEY SUCCESS FACTORS	<ul style="list-style-type: none"> <li>• Knowledge of accounting theory/practice.</li> <li>• Ability to manage time and complete assignments as prioritized by manager and/or partner.</li> <li>• Strong attention to detail with the ability to ensure accuracy, clarity and thoroughness.</li> <li>• Ability to develop effective relationships with clients and team members.</li> <li>• Ability to communicate effectively in person, in writing and by telephone, in a prompt, courteous manner.</li> <li>• Ability to recognize client problems.</li> </ul>
RESPONSIBILITIES	<ul style="list-style-type: none"> <li>• Proficient in work paper preparation/review including balance sheet approach (i.e. work paper for each balance sheet account)</li> <li>• Proficient in compilations and working knowledge of reviews.</li> <li>• Manages one or more client assignments simultaneously, ensuring overall success within designated time frames.</li> <li>• Manages the implementation of solutions for clients and exhibits flexibility to adapt to whatever the situation calls for.</li> <li>• Identifies a client's need and/ or opportunity in order to sell/cross-sell products or services.</li> <li>• Actively pursues self-development opportunities</li> <li>• Shares and transfers knowledge within the team.</li> <li>• Works as an effective team member to complete project components and assigned tasks.</li> <li>• Maintain a working relationship with all other personnel to successfully accomplish firm goals.</li> <li>• Actively supports new initiatives by demonstrating enthusiasm and dedication.</li> <li>• Proficient in implementation of client accounting systems.</li> <li>• Actively performs controller level duties for one or more client companies.</li> <li>• Proficient in preparation of individual and business tax returns.</li> <li>• Exhibits an understanding of firm policies and procedures.</li> </ul>



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KEY PERFORMANCE INDICATORS	<ul style="list-style-type: none"><li>• Marginal contribution to firm revenue - 1,750 annual billable hours / 2,300 annual total hours</li><li>• Client assignments and tasks within engagement budget</li><li>• Risk taking, innovation and creativity</li><li>• Client feedback</li><li>• Continuous learning – required CPE and/or career development course(s) required by firm</li></ul>
QUALIFICATIONS/SKILLS AND EXPERIENCE AND PERSONAL ATTRIBUTES	<ul style="list-style-type: none"><li>• CPA or CPA candidate with 1-2 years of public accounting experience.</li><li>• Strong technical knowledge and skills.<ul style="list-style-type: none"><li>◦ Knowledge of computer operations and software, specific to Creative Solutions Suite of products, RIA/PPC Research products and Microsoft products.</li></ul></li><li>• Strong interpersonal and relationship building skills.<ul style="list-style-type: none"><li>◦ Attend one networking event per month</li></ul></li><li>• Strong project management skills.</li><li>• Team management skills - the ability motivate.</li><li>• Team player with a positive 'can do' approach.</li><li>• Creative problem solving ability.</li><li>• Excellent verbal and written communication skills.</li><li>• Experience in delivery of quality client service.</li><li>• Knowledge of firm products and services.</li></ul>

