

MANAGER

TITLE: Manager
CLASSIFICATION: Full-time
REPORTS TO: Principals and/or Partners
SUPERVISES: Staff and Senior Accountants

SUMMARY OF RESPONSIBILITIES

Managers are essentially partners-in-training, and are involved in almost all of the areas for which partners are responsible. They have exhibited technical proficiency and the ability to supervise and complete engagements, possess a thorough knowledge of the firm's policies and procedures, and serve as intermediaries between partners, clients, and senior accountants. In addition, managers possess the experience and overall potential necessary to be considered for admission as a partner in the firm.

ESSENTIAL FUNCTIONS

1. Assume responsibility for planning, supervising, and completing engagements.
2. Plan the timing and assigning of staff to engagements.
3. Review engagement workpapers, resolve any problems, and keep the partner informed of all important developments in the engagement.
4. Prepare client billings.
5. Evaluate the performance of staff and senior accountants.
6. Develop new client contacts and relationships beneficial to the firm.
7. Assist in administrative functions as assigned by the partners.
8. Recognize opportunities to provide additional services to existing clients.
9. Begin to demonstrate an ability to obtain clients and develop existing clients as partner involvement decreases.
10. Begin to develop an ability to achieve client confidence with co-managed and solely managed clients.

OTHER FUNCTIONS

11. Perform other duties as assigned from time to time by the firm's partners.

WORKING CONDITIONS

12. Job involves work in the firm's office or on the client's premises. Work on the client's premises may require the use of the manager's personal car.
13. Moderate to low overtime required throughout the year. High level of overtime may be required to complete specific audit and/or tax engagements.

REQUIRED EXPERIENCE

14. Managers normally have a minimum of three years experience as a senior accountant (or equivalent experience as deemed appropriate by the partners).

REQUIRED LICENSES AND CERTIFICATES

15. Managers must be certified public accountants.

PROFILE OF A MANAGER

Below are listed some of the criteria to be used in your evaluation. It is expected that these abilities, attributes and characteristics will develop as you progress in experience.

Professional ability and attributes:

1. Workpapers and schedule preparation techniques are neat, clear and concise.
2. Understand assignment and ability to follow instructions.
3. Knowledge of APBs, SAS, Audit Manual and Tax Guide, etc., and ability to apply same.
4. Ability to recognize theoretical accounting problems and provide realistic solutions for same.
5. Ability to get a good job done in minimum amount of time.
6. Ability to instruct and train other staff members.
7. Knowledge of tax law and issues to assist clients in planning, compliance and special projects.
8. Attentiveness to assigned client needs.
9. Decision-making ability.
10. Ability to delegate and supervise.
11. Ability to work without excessive assistance.

Personal attributes and characteristics:

1. Appearance always neat and acceptable.
2. Ability to communicate (written and oral) with associates and client personnel.
3. Personability – must be friendly and receptive.
4. Manners – display poise and composure at all times.
5. Punctuality
6. Enjoyment of work.
7. Continued desire to learn.
8. Cooperativeness with all staff and client personnel.
9. Creative and innovative in accounting-related matters.
10. Self-confidence
11. Tact
12. Proper attitude about firm.
13. Proper attitude about fellow employees.
14. Leadership
15. Drive and initiative.
16. Willingness to seek and accept responsibility.

CLIENT RELATIONS

1. Able to handle, assign and review second level clients (fees up to \$10,000).
2. Assist partner-in-charge with first level clients.

This job description does not list all the duties of the job. You may be asked to perform other instructions and duties. You will be evaluated in part based on your performance of the tasks listed in this job description.

The firm's management has the right to revise this job description at any time. The job description is not a contract for employment, and either you or the firm may terminate employment at any time, for any reason.