

POSITION DESCRIPTION

POSITION:	INTERMEDIATE ACCOUNTANT
COMPANY:	COLLINS & CO
REPORTS TO:	Team Leader – Tax and Business Services
LOCATION:	FOOTSCRAY
DATE:	September 2020

PURPOSE OF POSITION:

- To undertake work on client matters in an efficient, timely and knowledgeable manner.

MAJOR DUTIES AND RESPONSIBILITIES:

- Ensure that Practice policies and procedures are followed constantly.
- Participate in the development of Practice strategies and initiatives as required – especially, but not solely limited to, those relating to tax and business services. Assist with the implementation of said activities in the manner agreed with the Team Leader.
- Develop & maintain relationships with external third parties that are strategic to the operation and development of the Practice.
- Work with all Practice Partners to ensure that the Practice leverages its client relationships so that clients know about, and may benefit from, the full Collins & Co service offering.

SPECIFIC DUTIES AND RESPONSIBILITIES (KPI's):

- Communicate with Team Leader to ensure that client work is undertaken and completed in an efficient, timely and knowledgeable manner.
- Assist in the preparation of financial statements for Companies, Trusts, and Partnerships for a range of clients in various industries.

- Assist in the preparation of income tax returns for Individuals, Companies, Trusts and Partnerships.
- Assist in the preparation of BAS statements and have an understanding of issues relating to CGT/FBT/Div 7A/Payroll/Workcover and Superannuation.
- Identify and raise client accounting and business issues with senior staff and suggest possible solutions
- Develop and maintain relationships with clients and external third parties as required
- Assist team members and training junior staff
- Plan and manage engagements and staff to ensure deliverables meet work plan specifications and deadlines
- Ensure all work & client files comply with Collins & Co quality systems & procedures.
- Seek to generate a harmonious & communicative team environment where assistance is rendered to fellow team members readily.
- When requested assist in the training & mentoring of new practice staff members.
- Assist in the preparation of draft client bills and ensure that the client is invoiced in a timely manner.
- Work with Team Leaders to ensure that the Practice has appropriate procedures in place to ensure consistent overall quality & delivery of services to clients – especially in the area of tax and business services.
- Keep up to date with developments in the Accounting Profession – especially in the field of taxation.
- Attend, on a regular basis, Practice briefing meetings as required.
- Attend all team meetings.
- Where applicable, represent the practice at meetings with third parties, customers/clients and key industry functions.
- Implement initiatives in accordance with Practice Partnership policies.
- Where appropriate, work with third parties on Collins & Co client matters.
- In consultation with the Team Leader and the appropriate Partner, broaden your professional skills in areas that may not be directly related to taxation.

COMPETENCIES/EXPERIENCE REQUIRED

- Have an accounting related degree
- Have either obtained or be seeking to obtain the appropriate formal qualifications required by the practice and the profession - CPA or CA
- Have three to five years practical experience working in Tax and Business Advisory with an Australian professional accounting firm.
- Have an understanding of MYOB and other accounting packages such as Xero and QuickBooks, as well as Word and Excel.
- Excellent written and verbal communication skills as well as well-developed interpersonal skills
- Be able to work within a team environment but also autonomously with minimal supervision
- Experience managing junior staff and reviewing their work.
- Have excellent time management and organisational skills and an attention to detail
- Have had direct client exposure
- Self – motivation