

---

## JOB DESCRIPTION

# SENIOR

---

Wheeler, Wolfenden & Dwares, PA is currently looking for a senior accountant due to growth of the firm and recent turnover. We are looking for a dynamic person that fits in with our culture. This person should be a team player who is willing to get involved with the community. He or she should be a self starter, confident, willing to take initiative, and comfortable with public speaking. This is an excellent opportunity to become part of our organization and has great opportunity for advancement and growth.

### **Definition**

A Senior Accountant reports to the partners relative to general employment matters and to the manager or supervisor relative to matters pertaining to specific engagements. A Senior must exhibit high standards of professional and social ethics and must accept full responsibility as the in-charge accountant for engagements of varying size and complexity to include, planning and coordinating the various phases of the field work, directing and reviewing the work of a number of assistants, and making decisions on all but the most unusual accounting, auditing and tax matters.

**Reports to:** Partner, Managers, Supervisors

### **Performance expectations and assignments**

#### ❖ Supervisory Responsibilities

- Perform and supervise the broadest range of auditing, tax, and accounting issues from start to finish, oversee larger and more complex engagements, potentially one or more assignments simultaneously.
- Plan and coordinate the various phases of the fieldwork such as staff requirements, logistics, audit programs, and time budgets.
- Schedule, delegate, and review the work of one or more staff members, support on-the-job training, and evaluate their performance.
- Guide the decision making process on all but the most unusual audit and accounting matters.
- Ensure complete and timely engagement wrap-up to include preparation and/or review of financial statements and tax returns, schedule Principal and central reviews, may coordinate closing meetings with clients.

#### ❖ Audit, Accounting and Tax Responsibilities

- Evaluate the client's internal controls, prepare an audit program outlining the extent of sampling required, schedule the engagement, and document approval by the Engagement Partner
- Review working papers for accuracy and completion, financial statements for suitability of presentation and adequacy of disclosures, tax returns, and documentation of discussions with clients.
- Break down complicated tax returns into tasks for staff accountants to complete, review tax returns, and suggest client tax planning.
- Summarize engagement, make planning points for the next year, prepare management letters, draft reports, and prepare routine client correspondence.
- Follow the progress of the engagement, aid in clearing points, and resolve auditing and accounting problems.

- Coordinate and expedite the review of files by the Account Manager, Tax department, Audit & Accounting Partner and the Engagement Partner.
- Keep the Account Manager/Partner apprised of the progress of the engagement, consult with them on problem areas, review with them any significant audit findings, and recognize client service opportunities to follow-up on post fieldwork.
- Obtain relevant information from client for corporate and individual tax returns.
- Break down complicated tax returns into tasks for staff completion, delegate tasks, coordinate schedules, supervise execution, and review work of staff.
- Perform detail review on tax returns, research, and compliance work with an emphasis on calculations, accounting theory, and tax law compliance.
- Review files to ensure that they possess the necessary signatures, contain the necessary supporting documentation, and comply with filing due dates; obtain proper filing extensions if necessary.
- Suggest client tax planning including projections, present alternative cases and evidence, propose solutions to outstanding tax issues or problems, and initiate client services unrelated to actual tax practice.
- Communicate work results to Partner and/or client for review and discussion.
- Complete or supervise research on highly complex tax matters and resolve ancillary tax issues, to include matters related to special elections, correspondence, non-profit organizations, estates and trusts, and gift tax returns.
- Develop working relationships with client personnel and firm associates
- Communication capabilities in writing and speech
- Enthusiasm for work, especially more advanced or technical projects
- Creative and initiative

#### ❖ Development Responsibilities

- Cultivate an increasing level of technical skills in auditing, tax, or management services, and consider the possibility of industry or service specialization.
- Keep current with Firm and State Board CPE compliance requirements.
- Develop a learning program to continually develop and expand knowledge and expertise through learning opportunities: on-the-job, in the classroom and through professional literature and associations.
- Increase participation in activities outside of the firm to further develop interpersonal and communication skills, with an awareness of practice development responsibilities.
- Actively seek opportunities to expand services to existing clients and develop new business.

#### ❖ Administrative Responsibilities

- Promote and uphold the firm's policies and procedures, and become knowledgeable in the firm's services.
- Complete appropriate billing forms as a follow-up to the budgeting process.
- Prepare regular and timely staff evaluations.
- Perform support responsibilities to include copying, filing, and preparing client information.
- Communicate schedule conflicts to manager; monitor time and materiality to ensure proper completion of tasks.
- Become knowledgeable in the firm's services.

#### ❖ Interpersonal Contacts

- Communicate engagement problems, findings, and status to Account Managers and Partners.
- Coordinate and delegate the work of staff accountants and interns.
- Interface with client personnel to review audit and accounting findings, clarify results and encourage revised practices.
- Contact agencies and organizations by phone or letter to gather ancillary client information.

- Periodically oversee interns and staff accountants to provide work direction and review work assignments.
- Frequently interface with client personnel to review and apply audit and accounting principles.
- Continually interacts with peers and supervisors to gather and prepare information.
- Frequently contacts agencies and organizations by phone or letter to gather information.

### **Essential job functions**

- ❖ Knowledge of the basic accounting concepts involved in auditing and tax return preparation
- ❖ Basic PC experience
- ❖ Analytical, yet creative thinking to enable effective decision making
- ❖ Strong goal orientation/self-motivation
- ❖ Ability to handle pressure in a positive professional manner
- ❖ Excellent interpersonal skills - client service orientation
- ❖ Solid written communication skills to enable incumbent to prepare accurate and detailed work papers and reports
- ❖ Is a team player
- ❖ Possess responsibility, integrity and commitment
- ❖ Exhibits appropriate appearance and attitude
- ❖ Responsible for the care and handling of computer hardware and other office equipment.
- ❖ Learn and apply computer software programs.
- ❖ Manage effectively the physical and emotional demands of tax season.
- ❖ Drive a personal car to clients and other engagements.
- ❖ Take detailed notes and maintain organized files.
- ❖ Maintain positive relationship with clients.

### **Educational requirements**

- ❖ 4-year college degree in Accounting
- ❖ 2+ years public accounting experience, is consistently in-charging engagements at a high quality level.
- ❖ CPA certification, or actively working to become certified.
- ❖ Advanced technical knowledge of audit, accounting, and tax concepts and the ability to apply these services to various client situations.
- ❖ Analytical, creative approach which will enable incumbent to effectively supervise engagements and effectively guide the decision making process.
- ❖ Dynamic interpersonal manner with the capacity to train through supervised practice.
- ❖ Strong goal orientation balanced with an awareness of materiality.
- ❖ Excellent client service orientation with an ability to handle pressure in a positive, professional manner.

### **Working conditions**

Every employee works for Wheeler, Wolfenden & Dwares, P.A. not only for a particular supervisor or department. Accordingly, employees are expected to act in the best interest of the firm, even if doing so requires actions or responsibilities not listed in the above job description. This job description is provided for informational purposes only and is subject to revision by management.