



## Position Description

**Position:**

**Associate**

**Location:**

All Locations

**Reports To**

Principal

**Responsible For::**

Team of Professional and Support Staff

**Primary Objectives:**

- Maintain and care for a group of clients and provide support and review for team members. Care for the delegation of work and provide responsibility for high-level assignments.
- Actively work to increase firm revenue by attracting new clients, through cross referrals and developing new services.
- Work directly with decision makers at firm and client levels and exceed expectations; make use of advancement opportunities and maintain satisfactory work/life balance.

**Key Performance Indicators:**

- Chargeable time maintained at a minimum of the agreed hours per annum.
- Write off levels maintained at less than 10%
- Actively work with Principal to create new business growth of at least 10%.

**Expected Functions & Tasks:**

TECHNICAL

- Care for a group of clients in a broad range of accounting, taxation and business matters.
- Responsible for the organisation and completion of work assignments for team prior to Principal review.
- Competently reviews the work of other team members.
- Proactively undertakes training and development to improve skills and techniques of both self and team.
- Actively participates in the firm's technical groups

OPERATIONAL

- Ensure resourcing of staff is adequate to allow completion of work on time and within budget.
- Take responsibility for the completion of work allocated and delegated to others.
- Provide feedback in a constructive and helpful manner.
- Adhere to internal policies and procedures.
- Support other team members and promote a positive work environment.
- Presents opportunities to improve work practises, client service and internal processes. Encourages others to do the same.
- Identify and take appropriate action on non-compliance issues

#### CLIENT SERVICE

- Displays a strong client service ethic.
- Produces quality client documentation and work within agreed timeframes and presentation standards.
- Maintains an awareness of changes to legislation and industry practices and is pro-active in presenting the impact of these to Managers and clients.
- Prepare and approve client fees. Participate in debtors' collection as required.

#### PERSONAL

- Demonstrates a positive attitude, enthusiasm and maturity.
- Maintains high levels of professionalism at all times.
- Responsibility for prioritising and managing own workflow within time and budget requirements.

#### STRATEGIC

- Represent and promote the Firm, including participating in marketing activities, as required.
- Actively considers and utilises opportunities for business development including cross referrals and marketing.
- Implement team strategic goals and objectives
- Refer to Delegated Authority documents

#### **Delegated Authority**

#### **Qualifications:**

- Completed University studies with a degree in commerce, accounting or business.
- CA/CPA qualifications completed

#### **Experience:**

- 7+ years post degree experience in accounting or professional practice.
- Demonstrated high level experience in business systems and management practices.
- Excellent technical skills and knowledge.
- Demonstrated experience in supervising others and coordinating team workflow
- Demonstrated leadership skills.
- Demonstrated ability to build business networks and grow a client base.
- Proficiency in Microsoft Office including Word, Excel and Outlook.
- Proficiency with Practice Management (eg. APS) and Commercial Accounting (eg. Cashbook Plus, MYOB) software packages.



**Personal Attributes**

- Excellent written and oral communication skills.
- Creative problem-solving ability and a consultancy mindset.
- Demonstrate flexibility and works well under pressure.
- Demonstrate a strong service attitude and approach.
- Demonstrate sound decision making skills.
- Project enthusiasm and motivate team/staff.
- Commit to organisational goals and objectives.
- Pay attention to detail and encourage the same in others

**Other Requirements:**

- Current Drivers Licence
- Ability to travel to client sites as required.