

## JOB DESCRIPTION

**Position Title:** Staff Accountant

**Supervisor:** Tax and A&A Supervisor

**Primary Assignment:** Tax,  
Accounting and  
Auditing

**Secondary Assignment:**

### Position Purpose

Fulfill the corporate mission and vision by performing Tax Staff Accountant duties in accordance with Firm values.

### Performance Expectations

- A. Prepare tax returns, tax planning and financial statements.
- B. Stay updated on regulations.
- C. Maintain competencies in firm software.
- D. Assist client management staff as needed.

### Duties

The Tax Staff Accountant purpose position will be achieved by effectively demonstrating:

- A. Completion of tax returns, financial statements and other accounting related tasks as assigned by the Department Supervisor.
  - 1. Prepare, examine and evaluate accounting records, financial statements, and other required financial reports according to approved procedures to obtain accuracy, completeness and reporting conformance.
  - 2. Compute taxes owed and prepare tax returns according to approved procedures, ensuring compliance with payment, reporting and other tax requirements.
  - 3. Evaluate business operations, trends, costs, revenues, financial commitments and obligations to project future revenues and expenses.
  - 4. Provide ongoing client support, as directed by the Department Supervisor, by systematically gathering information, adjusting journal entries, keeping records, examining reports, answering questions and providing ongoing technical assistance.
  - 5. Execute and support quality control procedures to ensure firm operations align with best practices and reporting documents comply with AICPA standards.
  - 6. Log services provided so records are consistently accurate, updated and available.
- B. Proactive engagement in ongoing professional development.
  - 1. Remain updated regarding technology advances, general economic trends, political developments and legislation that could affect the clients.
  - 2. Maintain expert knowledge, skills, and abilities in core areas by seeking out and participating in continuing education courses, seminars, and other learning opportunities.
  - 3. Review appraisal findings and collaboratively create professional development plans with the Department Supervisor.
  - 4. Execute professional development plans.
  - 5. Participate in selected and designated training opportunities to ensure proficient knowledge, skills, and abilities in the areas of accounting and auditing.
- C. Client relationship building initiative.
  - 1. Identify, develop and systematically implement agreed upon services that enable the firm to remain on the forefront of customer service delivery.

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2. Collaborate with other department personnel by communicating effectively, offering expertise when requested and requesting professional input from other content experts as required.
  3. Remain current on approved internal and external services offered by the firm to help clients achieve specific goals or satisfy particular needs.
  4. Implement firm procedures for identifying client opportunities and recommending approved services.
- D. Active engagement in continuous department improvement planning and execution.
1. Initiate identification and communication of issues to keep management aware of opportunities for department and/or organizational improvement.
  2. Participate in department action planning with other personnel as directed by the Department Supervisor.
  3. Execute continuous department improvement plans with fidelity.
  4. Continuously monitor annual action plan execution and report progress to the Department Supervisor.
  5. Actively evaluate department plans with the Department Supervisor and adapt plans flexibly through daily practice and periodic meetings or work sessions.
- E. Compliance with all handbook policies and operational procedures.
- F. Completion of other projects and duties assigned by the Department Supervisor and/or Operations Manager.

### Position Qualifications

#### A. Education and Experience

1. Bachelor's degree in accounting or other related program or CPA certification.
2. Experience in accounting with a career history of accurately completing work and other assignments in a timely manner.

#### B. Knowledge, Skills and Abilities

1. Customer Service. Demonstrated use of principles and processes for providing outstanding customer service. This includes customer needs assessment, meeting quality standards for services and evaluation of customer satisfaction.
2. Judgment and Decision Making. Demonstrated ability to systematically consider relative costs and benefits of potential actions; critically analyze related variables; and logically apply reasoning when selecting goals and making plans.
3. Communication. Demonstrated use of communication to understand and correctly interpret information and ideas presented through non-verbal, verbal and written modes as well as to convey information and ideas professionally to individuals and groups through presentation of words, actions, and documentation.
4. Technology. Demonstrated use of computers, Microsoft Office Suite software, internet and other electronic means to gather and disseminate information; communicate with colleagues and customers; construct and revise Word and Excel documents; and store and retrieve data.
5. Economics and Accounting. Demonstrated use of economic and accounting principles/practices, financial market/banking analysis and succinct reporting of financial data.
6. Attendance. Demonstrated ability to consistently arrive to work on time and remain focused on task throughout the day without allowing distractions to interfere with completion of work.