



Senior Accountant Job Description

Company:	Chapman Upchurch Limited
Employee:	
Job title:	Senior Accountant
Reports to:	Team Leader
Date prepared:	7 August 2020

Position Summary

To assist the Team Leaders with accounting services for a range of clients.

Key Responsibilities

Client relationship management	
Tasks	KPIs
<ul style="list-style-type: none">• Primary contact for your clients• Communicate proactively with clients to understand their needs• Articulate the value of our services outside of annual accounting preparation to clients• Monitor scope of work and fees• Advise client of change in scope and fees• Monitor level of service to ensure it meets clients' expectations	<ul style="list-style-type: none">• 100% of services priced and agreed in advance• No fee disputes with clients• 24 hour turnaround on emails and calls• 100% of changes in scope documented and re-priced
Annual accounting and compliance	
Tasks	KPIs



<ul style="list-style-type: none">• Prepare interim and end of year financial statements for review• Prepare payroll and payroll tax returns for clients• Prepare Company and Trust statutory compliance documents as required• Review work assigned to other team members• Interview clients• Complete key project management tasks as assigned• Prepare proposals for services• Support sales and marketing departments to implement projects• Prepare and review other compliance returns• Monitor tax payments for clients• Prepare tax updates and finance applications• Prepare monthly management accounts and attend client meetings• Troubleshoot cashbook issues for clients• Prepare cashflow forecasts, actual to budget analysis, variance analysis, and offer profit improvement strategies to clients• Prepare letters, correspondence, reports and other documents as required• Prepare business valuation reports• Provide support for Financial Awareness Coaching• Provide support for sales and purchases and due diligence	<ul style="list-style-type: none">• Maximum of 5 review points on each file• Jobs turned around within agreed time frames• 24 hour turnaround on emails and calls• Proposals sent within 48 hours of meeting / discussion
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Workflow management and job budgets	
Tasks	KPIs



<ul style="list-style-type: none"> • Understand Chapman Upchurch Limited's workflow expectations • Use the tools and procedures available to monitor progress • Manage WIP budgets and turnaround time proactively • Deal with client challenges and roadblocks in a timely manner • Monitor accuracy of work completed • Achieve lodgement due dates • Ensure sufficient workflow 	<ul style="list-style-type: none"> • Maximum of 5 jobs open at one time • Budgets are agreed and met with 0% write-off • Jobs turned around within 6 weeks • Individual KPIs achieved • Work plans used on all jobs
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Service and business development	
Tasks	KPIs
<ul style="list-style-type: none"> • Identify opportunities for additional services • Sell and deliver additional services • Engage in ongoing professional development • Develop external networks and referral relationships 	<ul style="list-style-type: none"> • 75% uptake of new service offerings • Minimum of 20 hours of CPD per annum

Team leadership and development	
Tasks	KPIs
<ul style="list-style-type: none"> • Communicate expectations and job requirements clearly (scope of work, fees, turnaround time) • Delegate effectively • Provide feedback on work in progress • Provide feedback on quality of work completed 	<ul style="list-style-type: none"> • Work completed within budget and on time • Delegation rules followed 100% • Maximum of 5 open jobs per team member • WIP targets met • Peer review checklist completed on all delegated jobs

Qualifications, Experience, and Competencies

Qualifications and experience	<ul style="list-style-type: none"> • Minimum of 4-5 years of Public Practice experience • CA / CPA Certification • Proven experience with Xero / MYOB / Word / Excel
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Core Competencies	<ul style="list-style-type: none">• Analytical and problem solving skills• Excellent written and verbal communication skills• Highly effective relationship management skills• Planning and organisational skills• High quality of working papers• High degree of accuracy, responsibility and attention to detail• Adherence to internal procedures
What we expect from you	<ul style="list-style-type: none">• Prepare financial statements with a high degree of accuracy• Complete jobs on time and within budget• Generate leads and bring on new clients• Establish priorities to efficiently manage workload• Identify and address workflow issues• Reallocate jobs when required• Achieve monthly budget and other KPIs• Communicate clearly and in a timely manner with clients
What we want from you	<ul style="list-style-type: none">• Relate to clients and understand their needs• Manage clients proactively• Delegate effectively• Clearly articulate value of services to clients and gain conceptual agreement to proceed with additional services• Able to work under pressure• Able to meet deadlines• Assist other team members where appropriate• Work in a focused manner and with attention to detail• Display each of the following attributes - excellent work ethic / dedication / punctual / initiative / personality / proactive / organised / professional

Hours of Work

40 hours per week Monday to Friday from 8:30 am to 5:00 pm.

General

Chapman Upchurch Limited provides formal and informal training for all team members, and provision for members who are studying for relevant qualifications can be negotiated on an individual basis.

Read and agreed to by:

Signed:	
Name:	



CHARTERED
Accountants
CHAPMAN UPCHURCH LIMITED

Date:	
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