

## **ASSOCIATE**

**SUMMARY:** Associates perform a wide variety of diversified accounting and tax assignments under the supervision of senior staff members.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:** Include the following, but are not limited to, and are required to perform this job successfully. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Prepares various phases of audits, reviews and compilations.
- Assists with proofing financial statements, tax returns and other documents.
- Compiles financial information to prepare entries to accounts, such as general ledger accounts, documenting business transactions using computer software program.
- Reconciles sub-accounts to control accounts.
- Performs audit, review or compilation procedures as assigned.
- Drafts management financial statements and footnotes.
- Prepares budgets based on prior years actual hours and budgeted hours.
- Assists in the planning of an engagement by drafting or preparing confirmations, engagement letters, planning letters, trial balances, setting up files, etc.
- Collects appropriate data and prepares federal and state tax returns.
- Progresses professionally by working towards passing the CPA exam.

### **OTHER FUNCTIONS:**

- May be given senior level responsibilities of planning and scheduling engagements.
- May be required to perform all phases of an engagement, including report writing and tax return preparation.
- May supervise other Associates.
- Such other duties as may be assigned.

### **SPECIAL SKILL REQUIREMENTS:**

- Proficient computer skills, including Microsoft Word and Excel.
- Ability to define problems, collect data, establish facts, draw valid conclusions and present in a structured manner to a member of higher staff or client.
- Ability to interpret an extensive variety of technical instructions and manage several abstract and concrete variables.
- Must have good interpersonal and communication skills; and the ability to interact professionally with outside contacts. Examples of outside contacts include, but are not limited to: clients and client personnel; government agency officials and bankers.
- Should be detail-oriented, have good organizational skills and possess the ability to prioritize.

**REQUIRED EDUCATION and EXPERIENCE:** Bachelor's Degree (B.S.) in Accounting from a four-year College or University and one year of related experience demonstrating a progression in complexity of auditing and accounting tasks and tax knowledge.

**REQUIRED CERTIFICATES, LICENSES or KNOWLEDGE:** A current and valid certified public accountant's license, or be working toward obtaining CPA license.

**PHYSICAL REQUIREMENTS:** All of the physical requirements listed below are those that may be necessary for an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Sitting; standing; walking or moving throughout facility; driving (and valid driver's license); talking; seeing (specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus); hearing; feeling; bending or stooping; squatting or crouching; reaching; kneeling; pushing; pulling; lifting up to 25 lbs.
- Minimal safety hazards; general office working conditions.

**WORK ENVIRONMENT:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The working environment changes with the client and the professional services provided for that client. A significant percentage of time will be spent indoors in an office atmosphere. Occasionally client work could be outside, in a warehouse, on factory floors, etc., if necessary.

- Frequent same-day travel, using a personal vehicle, for work at client's offices, meetings or seminars.
- Occasional out-of-town travel, using a personal vehicle or firm provided transportation, with overnight stay for work at clients, meetings or seminars.
- Occasional overtime is required throughout the year.
- Heavy overtime work is required from February 1 through April 15 ("busy season") and may be in excess of 55 hours per week. Additional policies may be put into effect during busy season, *i.e.*, no vacation or non-emergency-related personal time away from the office.

This job description does not list all the duties of the job. You may be asked by Supervisors, Managers or Directors to perform other instructions and duties. You will be evaluated in part based upon your performance of the tasks listed in this job description.

**DEPARTMENT:** AUDITING & ACCOUNTING

**CLASSIFICATION:** FULL-TIME, EXEMPT

**REPORTS TO:** PROFESSIONAL(S) IN CHARGE OF ASSIGNMENTS

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