

A&A MANAGER AND SUPERVISOR

SUMMARY: An A&A Manager or Supervisor is a liaison between the Director, client, and professional staff. They are responsible for overseeing multiple auditing and accounting projects and client engagements simultaneously, and scheduling, staffing, and coordinating engagement workflow. Both develop and train staff and maintain relationships to cultivate new business for the firm.

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.

- Responsible for all phases of an audit, compilation, or review engagement.
- Maintains contact with clients throughout the year; possesses a thorough knowledge of the client and all facets of client's business.
- Plans, schedules and staffs engagements using firm policies and procedures.
- Maintains familiarity with qualifications of all staff members, reviews staff assignments for appropriateness.
- Prepares and reviews engagement letters for approval by Director.
- Evaluates internal controls and work programs prepared by staff.
- Adheres to engagement time budgets.
- Supervises staff and provides on-the-job training, reviews work papers and report prepared by staff.
- Anticipates problem areas of engagement and questions that will arise.
- Keeps Director informed of all important developments on engagement, analyzes problems and recommends solutions.
- Ensures that financial statements, tax returns, and letters of recommendation are prepared in accordance with professional and firm standards.
- Communicates progress of engagements, problems, and resolutions to client.
- Works to develop responsible, trained staff by assisting in performance evaluations.
- Prepares invoices to clients, communicates details of fees to clients, and assists in collection of overdue accounts.
- Possesses a complete knowledge of the firm's philosophy and its opinions on financial matters.
- Maintains a knowledge of general economic and political trends of possible tax or other legislation that could affect the business climate.

OTHER FUNCTIONS:

- Works to develop responsible, trained staff by assisting in recruiting, developing training aids, and acting as an instructor in professional development programs.
- Practices in firm's practice development efforts.
- Prepares other reports and projects as requested from time to time by the Directors.
- 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 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 or Master's degree in accounting from an accredited four-year College or University.
- A Supervisor should have at least five (5) years' experience in public accounting, demonstrating a progression in complexity, scope and number of engagements supervised.
- A Manager should have at least seven (7) years' experience in public accounting, demonstrating a progression in complexity, scope and number of engagements managed.
- Demonstrated ability to bring in new business to a CPA firm.
- Minimum of forty hours of continuing professional education is required each year to maintain and develop technical and business skills.
- Participates in career development program to improve managerial, communication and interpersonal skills.

REQUIRED CERTIFICATES, LICENSES or KNOWLEDGE:

- A current and valid certified public accountant's license is required for a Manager.
- Must be a member in good standing with the American Institute of CPA's.

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 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

SUPERVISES: A&A SENIORS AND STAFF ASSOCIATES

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