



SENIOR ASSOCIATE

SUMMARY: Senior Associates have 2 or more year's public accounting experience and perform a wide variety of diversified accounting and tax assignments with minimal assistance and within established budget. They often guide less experienced team members, instruct them in the work to be performed, review the work and direct necessary revisions.

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.

- Performs diversified accounting, auditing and tax assignments under the direction of a Supervisor, Manager or Director.
- Demonstrates competency in technical skills, work quality and application of professional and firm standards.
- Meets time constraints and client deadlines.
- Participates in planning and scheduling client engagements.
- Directs and instructs less experienced team members, where applicable, in work to be performed and work-paper review.
- Plans and determines the extent of test-checking required in an audit and selects the transactions to be tested.
- Prepares and indexes work-papers and performs various procedures established under generally accepted accounting principles to verify accuracy and validity of client's financial matters.
- Suggests client tax planning ideas to Supervisor, Manager or Director.
- Prepares routine correspondence to client for approval and signature by a Director and writes comments for management letters.
- Drafts reports including footnotes.
- Performs the broadest range of A&A functions so that direct participation of Supervisors, Managers or Directors is kept to a minimum.
- Acts as a mentor and provides feedback to less experienced team members in an effort to enhance their performance and provide on-the-job training.
- Progresses professionally by working toward passing the CPA examination, if not already attained.

- Promotes the firm by attending functions and events with clients, potential clients and peers.
- Prepares other reports, projects and 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 two or more years 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 Accountants license or working towards 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

SUPERVISES: A&A ASSOCIATES

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