



## **A&A MANAGER**

**SUMMARY:** An A&A Manager is the liaison between the partner, the client and the professional staff. Managers are responsible for managing multiple auditing and accounting projects and client engagements simultaneously, and scheduling, staffing, and coordinating engagement workflow. Managers develop and train staff, and make associations to develop 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 engagement letter for approval by partner.
- 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 reports prepared by staff.
- Anticipates problem areas of engagement and questions that will arise.
- Keeps partner 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:**

- Serves in educational programs as an instructor or discussion leader.
- Participates in firm's practice development efforts including expanding services to clients.
- Demonstrated ability to bring in new business to a CPA firm.
- Prepares other reports and projects as requested from time to time by managers or partners.
- 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 seven or more years experience in public accounting, demonstrating a progression in complexity, scope, and number of engagements managed.

**REQUIRED CERTIFICATES, LICENSES or KNOWLEDGE:** A current and valid Certified Public Accountants license.