



## **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.