PolsonHiggs
Business advisors

Position Description
Accountant to Senior Accountant
(Graduate to Chartered)

This position description covers the key responsibilities and outcomes expected for those gaining their Chartered Accountant (CA) qualification through to Chartered Accountants.

Those working toward their CA will undertake some aspects of these key responsibilities, as delegated by their Manager and will assist and support in the achievement of the outcomes expected.

Chartered Accountants will provide an appropriate level of supervision and coaching to develop graduate and non-qualified accountants. These will be known as Senior Accountant.

This position offers a pathway from graduate to a qualified chartered accountant.

Team: Accounting Solutions

Reports to: Manager

Direct Reports: Nil

Key relationships:

Internal: Partners and staff
External: Clients, Banks, Inland Revenue and other stakeholders

Position Objective

To provide compliance and advisory services by preparing accounting, tax and management information to a range of clients. Develop and maintain business and client relationships.

Misson and Values

Misson

Better outcomes through smart thinking, trust, and a positive approach.

Values

Employees at Polson Higgs are expected to demonstrate our values in all aspects of their work.

Integrity – Doing the right thing

Care – Being there

Excellence – Best outcome

Key responsibilities	Deliverables/outcomes

Accounting Solutions	• Preparation of timely, accurate and meaningful accounting, tax and management information for clients, including:
	  • Annual accounts and GST preparation
	  • Provisional tax lists
	  • Tax and GST returns
	• Working individually or as part of a team to complete consulting and compliance assignments.
	• Working in a wide variety of industries including sole traders, small to medium sized entities and some corporate clients.

Client Responsibilities	• Engages with clients to understand their needs. • Demonstrates and provides sound business and technical knowledge that is valuable to the client. • At times, undertake the review function for business services assignments as instructed by Manager. • Develop strategies for resolving client problems with a Manager. • Provide solutions in responsive and effective manner.
Advisory Assignments	• Working with other team members and other divisions within the firm to provide value added services to our clients. • Preparation of monthly accounts, assisting with budgeting and cash flow forecasting, management accounting, and providing business advice to our clients. • The opportunity to work closely with a number of our clients to assist them in developing their business.
Relationship Management	• Demonstrate a confident approach to any client/potential client contact. • Ensure commitments made by the firm to clients are responded to promptly and efficiently by the staff member when directed to do so. • Ensure full participation in the Accounting Solutions division team. • Work with colleagues in such a manner as to jointly achieve team goals. • Develop and maintain positive relationships with key contacts and stakeholders of the firm. • Take responsibility for the management of your workflow and have an understanding of the client and managers expectations. • Attend networking events to develop your professional relationships.
Business Management	• Accountable for quality, timeliness and presentation.

	• Actively manages workflow, ensuring deadlines are met.
Communication	• Communication is professional and appropriate, both internally and externally. • All written and verbal communication is clear and concise. • Documentation and emails are correctly maintained on SharePoint • Feedback is given and received constructively. • Completion of tasks and responsibilities is communicated to the Managers
Performance Development Plan (PDP)	• Active engagement with your performance development plan. • Opportunities for personal and professional development taken. • Participate in your goal setting process.
Health and Safety	• Comply with all Polson Higgs Health and Safety policies, procedures and current legislation • Responsible for reporting any hazard, risk or accident through the appropriate procedures
Other	• All other reasonable duties that are required of you

Person Specification

Skills, Knowledge and Abilities:

- *Excellent communication and interpersonal skills*
- *Ability to prepare quality correspondence and reports for review by manager (where appropriate).*
- *Developing to advanced skills in accounting software applications and other spread sheeting and office products*
- *Keeps up-to-date with relevant trends, shares this knowledge with others*
- *Ensures compliance with legislative requirements.*
- *Assesses risk for the firm and makes appropriate recommendations.*
- *Analyses data to make sound decisions*
- *Able to think laterally and apply ideas in a practical manner.*
- *Demonstrates and develops a sound understanding of accounting standards and the ability to apply these to individual client situations.*
- *Recognises complex accounting issues and refers them to senior staff for resolution*
- *Understands and uses appropriate technology to enhance the quality and effectiveness of assignments completed.*
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Personal Attributes:

- *Prioritises, uses appropriate resources, schedules work to achieve goals and timetables. Ensures projects are completed accurately and on time.*
- *Plans and manages assignments to reduce risk.*
- *Sets high standards of performance*
- *Has original ideas for continuous improvement*
- *Demonstrates a high level of personal motivation*
- *Displays strong attention to detail*
- *Displays mature, professional working behaviours*

Qualifications and Experience:

- *Bachelor of Commerce or other equivalent qualification in Accounting and must have completed all the requirements to be able to complete the Chartered Accountants of Australia and New Zealand (CAANZ) professional qualification*
- *Chartered Accountants must have completed the CAANZ professional qualification*