

Position Description

Position	Senior Client Manager
Reporting to	CEO
Duties & Responsibilities	<ul style="list-style-type: none"> • To look after your allocated clients base, including new clients, servicing them in all areas of taxation, accounting, and business advisory services • To manage your team, from your team’s Senior Production Manager and then accountants and bookkeepers which report to them as required • You are required to see clients face to face, helping them with: <ul style="list-style-type: none"> ○ strategic client meetings ○ client software selection ○ business mentoring ○ strategic tax planning and structuring advice • You will review to sign off completed work from your team’s Senior Production Manager • You will assist your team’s Senior Production Manager in training and developing the technical skills of their direct reports with all aspects of financial statement preparation, taxation return preparation, bookkeeping and payroll processing • In this regard, be task driven but also have an ability to work with other accountants and bookkeepers, helping and guiding them technically • Special Projects as required • General office administration • Other activities as directed by the CEO <p>You will have the following client and teamwork skills:</p> <ul style="list-style-type: none"> • Effective communication skills, both written and verbal • Good time management and planning skills • Effective presentation and mentoring skills • You are required to have a high level of interpersonal or selling skills in this role. • You should be a good leader, results and outcomes driven but with great people skills. • You should have the ability to be an extremely good communicator of complex technical information. • You are a natural people person and love working with and dealing with client’s problems.



<p>Qualifications & Knowledge</p>	<p>You will have the following qualifications and experience:</p> <ul style="list-style-type: none"> • The successful applicant needs a good level of technical knowledge and an ability to apply it to finalise Jobs for clients • CPA / CA / IPA designation • At least 7 years' experience in Australian public practice • Preparing and Analysing Tax Planning and other business management reports • Preparing Financial Statements and a range of tax Returns for: <ul style="list-style-type: none"> ○ Sole Traders ○ Partnerships ○ Trusts ○ Companies ○ Self-Managed Superannuation Funds <p>You will have a good understanding of the following technical knowledge:</p> <ul style="list-style-type: none"> • Individual Tax claims • Small Business advice – WorkCover, Payroll tax, FBT etc • Non-Small Business advice • Depreciation rules • CGT SBE Business Concessions • CGT Calculation on Sale of Property • SGC Obligations • Non-commercial loss rules • Division 7A loans • Franking Accounts and the dividend imputation system • Family Trust Elections • Completion of Co-invest / PLSA / equivalent administration • Taxable Payments Annual Reports • Tax minimisation strategies • Asset Protection Strategies
<p>Software Programs</p>	<p>You will have experience using the following software programs:</p> <ul style="list-style-type: none"> • Strong computer skills and use of in-the-cloud software • Microsoft Products- ie: Outlook, Word, Excel (Required) • Xero Accounting (Required) • Xero Practice Manager (Highly desirable) • Xero Tax (Highly desirable) • Xero Workpapers (Highly desirable) • FYIdocs (Preferred) • Class Super (Preferred) • NowInfinity (Preferred)