

Position Title: Staff Accountant

Manager: Client Manager



Success =

- Clients receive high quality, timely financials
- Sales taxes is paid timely & accurately.



Initial Goals

- Get assigned 15 small business clients
- Learn & understand the clients' business processes.
- Learn these clients' payroll, sales taxes, financials, etc.
- Learn our firm's production expectations, processes, software & team atmosphere.



Key technologies

- QuickBooks Desktop
 - QuickBooks Online
 - Excel
 - Outlook
- Canopy
 - Word
 - Lacerte
 - Teams



Ongoing Tasks

- Ensure clean, accurate books
- Code transactions in QuickBooks
- Reconcile bank accounts, credit cards & loans
- Prepare monthly financials,
- Prepare 1099's at Year End
- File sales tax returns
- Have a coachable attitude when managers have send backs/re-work requests



Key Metrics

- Number of Financials delivered on time - around 40 eventually
- Number of errors in monthly work - less than 10%



Benefits

- Salary is Depending on Experience
- Opportunity to earn monthly production incentive bonuses
- Health Insurance 100% paid
- Paid time off after 90 days
- Retirement benefits
- Long Term Disability, Tele-health, Health Savings Account contributions
- Annual all expenses paid company retreat
- Family friendly work environment
- Opportunity for advancement in a quickly growing firm
- Opportunity to be mentored and grow in a successful, lifelong accounting career

Place on Ownership Chart

