

Position Title: Client Manager

Manager: Sarah Berry (OWNER)



Success =

- Clients receive high quality, timely financials and tax returns
- Clients receive sound financial and tax recommendations
- Staff accountants are mentored in accounting theory



Initial Goals

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



Key technologies

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



Ongoing Tasks

- Review monthly financial statements completed by staff accountants
- Send staff accountants re-work notes as needed along with training
- Deliver financials to clients along with meaningful feedback
- Review sales tax reports, 1099's and other projects
- Tax Planning for small businesses
- Prepare business and individual tax returns
- Mentor and guide staff accountants
- Handle new monthly accounts as assigned



Key Metrics

- Number of Financials delivered on time- approximately 40 eventually
- Number of errors in monthly work - less than 10%
- Number of tax returns produced on time - about 150 per year



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

