Position Description

Senior Accountant

Role Purpose:

The Senior Accountant is responsible for supporting the Business & Personal Advisory (BPA) group to competently perform all compliance matters and participate in the delivery of client advisory services. This role is responsible for providing financial guidance and support to clients. This position aims to ensure the accuracy, integrity, and compliance of financial information while assisting clients in making informed business decisions. The Senior Accountant will be responsible for compliance related tasks, alongside conducting financial analysis, and offering assistance with strategic insights to enhance the financial performance and efficiency of our clients' businesses.

Key Responsibilities:

1. Client Advisory:
    - Serve as a contact for clients, offering tax and accounting advice tailored to their unique needs. Provide recommendations to improve financial performance and optimise business processes.
2. Tax Compliance:
    - Oversee tax planning and compliance activities for clients, ensuring adherence to tax laws and regulations.
    - Prepare and review tax returns and Business Activity Statements (BAS).
    - Prepare basic to medium level client advice and recommendations.
3. Financial Analysis:
    - Conduct in-depth financial analysis to identify trends, variances, and opportunities for improvement. Present findings and recommendations to clients and internal stakeholders.
4. Financial Reporting:
    - Prepare and analyse financial statements, including profit and loss statements, balance sheets, and cash flow statements. Ensure compliance with relevant generally accepted accounting principles and regulatory requirements.
5. Budgeting and Forecasting:
    - Assist clients in developing budgets and financial forecasts to support strategic planning and decision-making processes.
6. Audit Support:
    - Coordinate and support external audits for clients, and responding to auditor inquiries.

7. Process Improvement:
    - Continuously evaluate and enhance accounting processes, systems, and controls to increase efficiency and accuracy. Implement best practices to optimise financial operations.
8. Contribution to Team:
    - Provide training, guidance and support to less experienced accountants, including reviewing work, offering feedback, and fostering a collaborative and learning-oriented team environment.
    - Be able to effectively and appropriately delegate work, taking into account growth and training of total BPA team.
9. Record Retention:
    - Ensure proper storage and organisation of financial documents in accordance with legal and Firm policies.
10. Information Technology Systems
    - Develop understanding of key client accounting products.

Skill Requirements:

- Bachelor's degree in Accounting, Finance or related field, or relevant experience.
- To be in the process of completing the CA Program OR has successfully completed the CA Program (or an equivalent standing post graduate course)
- Strong analytical skills to interpret complex financial data and provide strategic insights. Attention to detail and accuracy in data analysis.
- Ability to understand clients' business challenges and offer tailored solutions.
- Excellent verbal and written communication skills to interact effectively with clients and team members.
- Ability to prioritise tasks, meet deadlines, and manage job budgets in a fast-paced, client-focused environment.
- Aptitude to identify and resolve accounting and tax issues proactively.
- Advance proficiency in the suite of client accounting systems, and add-ons.
- Upholding the highest ethical standards in handling financial information and maintaining client confidentiality.

Key Result Areas:

- *Timely and Accurate Financial Reporting*: Ensure financial statements and reports are delivered accurately and within established deadlines.
- *Client Satisfaction:* Achieve high levels of client satisfaction through exceptional service.
- *Compliance and Risk Management:* Maintain compliance with generally accepted accounting principles, tax legislation, and client internal controls to mitigate financial risks.
- *Financial Analysis and Insights*: Deliver meaningful financial analysis and insights that assist clients in making informed decisions.

- *Budget Recoveries*: Monitor and achieve annual chargeable hour requirements and recovery performance expectations.
- *Financial Performance*: Contribute to the financial performance of the division by completing accounting work to a high standard, retaining clients, and generating revenue through services, and identifying cross-selling opportunities.
- *Effective stakeholder communication*: Build strong relationships with stakeholders and provide timely, clear, and actionable communication regarding services, recommendations, and financial matters.
- *Teamwork*: Measured through contribution to team effort together with individual reliability and flexibility.
- *Team Values*: Adherence, advocacy and support of identified WLF and functional area teamwork principles.
- *Business Improvement*: assessment of involvement/ commitment to business improvement through identification/implementation of opportunities for improvement within our systems and business processes, demonstration of risk-based thinking, displayed attitude towards the WLF quality systems and procedures.