
OBJECTIVE

The Audit & Advisory Manager is responsible for overseeing client relationships, which would include managing multiple audit and accounting engagements simultaneously, as well as coordinating the delivery of other services, developing business proposals and other supervisory and administrative duties as required. The Manager oversees a group of staff, and is responsible for managing their daily activities and career development. The A&A Manager retains significant responsibility to grow the firm through new business as well as the scope of services to existing clients. The A&A Manager is technically sound in all authoritative accounting and auditing standards applicable to the clients serviced. Also, provides an example for staff to learn from and model for their own success.

ESSENTIAL FUNCTIONS

Relationship Management

Identifies and assumes varying roles in the servicing of a group of clients. This could include full client service responsibility whereby all services are provided and coordinated by the manager with minimal officer involvement, or a more specific role in certain facets of the services delivered.

- Develops a relationship with key client personnel and provides valuable ideas on an ongoing basis.
- Maintains contact with clients throughout the year; possesses a thorough knowledge of the client and all facets of client's business.
- Monitors the timeliness and effectiveness of the delivery of services provided by others within the firm.
- Uses knowledge of client's industry to identify relevant trends, developments and key performance drivers and communicates this information to client management.
- Working knowledge of business taxes and personal income taxes.

A&A Engagement Management

- Performs higher level A&A engagements and expands ability to perform or supervise new types of engagements.
- Demonstrates excellent project management skills, inspires teamwork and responsibility with engagement team members, and uses current technology and tools to enhance the effectiveness of deliverables and service.
- Responsible for all phases of audit, review, compilation or other accounting engagements. Plans, supervises, reviews and controls A&A engagements of all sizes and complexities for compliance with all professional and firm standards. This includes supervising time budget development and fee recommendations, working with internal staff and clients to plan engagement objectives and strategies.
- Communicates with appropriate individuals within the firm, and documents the status of A&A engagements. Keeps Officers informed of all important developments on engagement; analyzes problems and recommends solutions to clients and audit team.

People Management

Assist in managing A&A staff, including their career development, training and professional development, productivity and performance. Evaluates the performance of A&A staff and provides verbal and written feedback regularly. Proactively mentors and develops the technical and business development skills of A&A staff through various on-the-job training and other resources.

Business Development and Growth

Generates expanded revenues from new and existing clients through the communication and solicitation of additional services; networks to expand referral sources and identify prospect opportunities. Participates with firm personnel in marketing efforts, including proposal development, prospect calls, etc. Active community involvement and industry or professional groups, including leadership positions. Begin to develop a personal marketing plan. Maintains and enhances sales and presentation skills; support marketing efforts and development of client relationships for business growth.

Department Administration

Understands the economics of the A&A business and its relation to the firm. Assists in development and carrying out departmental goals, policies and guidelines. Regularly meets with other managers and department head to discuss and resolve issues. Assumes responsibility as a resource in specialized technical areas. Prepares other administrative reports and projects as requested by the Officers. Assists in the development and maintenance of internal reference material.

POSITION QUALIFICATIONS

EDUCATION & LICENSES	Bachelor's or Master's degree in Accounting preferred. Current and valid CPA license required.
EXPERIENCE	Typically, minimum 5 years professional experience in public accounting (leadership-oriented and in pursuit of managerial career path) with strong functional knowledge in all areas, demonstrating a progression in the complexity and scope of engagements
COMPETENCIES	Strong computer proficiency, accounting and audit software programs Strong written and verbal communication skills Successful problem-solving and analytical skills Ability to perform in highly interruptive conditions Ability to train and supervise staff in accounting, auditing and software skills in client, office and classroom settings Ability to understand and document accounting systems Project management ability Ability to perform under time-pressures and meet deadlines Ability to effectively identify engagement situations that may involve controversy and influence others to resolution
CHARACTERISTICS	Professional behavior and demeanor Proactive, ability and desire to be a coach and a leader Customer and community-oriented; ability to develop business relationships Strong work ethic, honest and ethical Proactive resourceful and customer oriented
PHYSICAL AND ENVIRONMENTAL WORK CONDITIONS	Ability to sit and use computers for extended periods of time Ability to travel by air and car Ability to carry/transport heavy briefcase, computers bags, etc., weighing approximately 20 lbs., etc. Ability to provide own transportation for regular travel (local and regional) to client assignments and for personal development programs Infrequent out-of-town travel with overnight stay for meetings, seminars and client engagements (up to 10-15%) Overtime work required periodically throughout year as needed.