



POSITION DESCRIPTION

Position Title: STAFF ACCOUNTANT

Classification: Full-Time, Non-Exempt

Reports To: Partner and/or Manager

Supervises: None

SUMMARY OF RESPONSIBILITIES

Under the general supervision of partners and manager, Staff Accountants have the capability to perform a wide variety of diversified accounting, auditing, and/or tax assignments by providing quality client service and maintaining profitable client relationships through competent completion of engagement assignments. Performance is based on the quality of work, applications of accounting knowledge, and the ability to meet time constraints.

ESSENTIAL FUNCTIONS

- Performs accounting, auditing, and/or tax assignments under the direction of the partner or manager, including the preparation of financial statements, work papers, and tax returns. Performs review procedures as assigned by supervisors. Completes engagements of moderate complexity with an emphasis on quality standards, timely completion within budget, and profitability. Keeps the partners and managers informed of all important developments on engagement, analyzes problems, and recommends solutions.
- Assists partners and managers in resolving client issues and problems; compiles research and prepares reports on various tax, audit or financial issues.
- Attend meetings with clients and have direct interaction.
- Performs other accounting, auditing, and/or tax duties as needed in engagements as assigned by supervisory personnel.
- Sitting majority of the time, some bending, stooping, kneeling, and walking.
- Lifting requirements of 30 pounds to carry audit bags, computers, and peripheral equipment to client locations.

OTHER FUNCTIONS

- Actively participates in the Firm's business development efforts. Professionally represents the Firm at business and community functions.
- Represents the Firm through participation in professional, charitable, and/or civic organizations.
- Participates and promotes Firm initiatives such as Business Development Program, Mentoring Program, and other Firm committees and activities.

EDUCATIONAL REQUIREMENTS

- Bachelor's Degree in Business, Accounting, or Finance, or Master's Degree in Accounting.
- Participation in career development programs to improve managerial, communication, and interpersonal skills.

EXPERIENCE REQUIREMENTS

- Demonstrated communication skills, both written and verbal, to effectively interface with all levels of Firm management and staff, clients, and outside business contacts.

REQUIRED LICENSES, CERTIFICATES, OR KNOWLEDGE

- Working towards obtaining a CA Certified Public Accountant's (CPA) License.
- Demonstrated use of computers, computer accounting software, and tax software programs.
- Valid California Drivers License and proof of insurance.

WORKING CONDITIONS

- Frequent same day travel for work at client offices, meetings, and seminars using personal vehicle.
- Out-of-town travel with overnight stay for work at client offices, meetings, or seminars.
- More or less than 40 hours worked, as required, through the year. More in excess of forty hours (40) required during tax season, February 1st – April 15th and audit season, September 1st to December 15th.

SAFETY HAZARDS OF THE JOB

- Minimal hazards. General office working conditions.

EMPLOYER RIGHTS

This position description does not list all the duties of the job. Employees may be asked by supervisors, managers, or partners to perform other duties. Performance evaluations, in part, will be based upon performance of tasks listed in this position description.

The Firm has the right to revise this position description at any time. The position description is not a contract for employment. That is, employment with the Firm can be terminated with or without cause, and with or without notice, at any time, at the option of the employee or that of the firm.

Reviewed and Approved: _____

Date: _____