



POSITION DESCRIPTION

Position Title: SUPERVISOR ACCOUNTANT-TAX

Classification: Full-Time, Exempt

Reports To: Partner and/or Manager or Senior

Supervises: Staff Accountants

SUMMARY OF RESPONSIBILITIES

Under the general supervision of partners, managers, and seniors, Supervisor 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.

ESSENTIAL FUNCTIONS

- Responsible for accounting, auditing, and/or tax assignments under the direction of the partner or manager. Completes multiple engagements of low to medium 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.
- Coordinates the completion of financial statements, work papers, tax returns and reviews financial statements and work papers prepared by the Staff Accountants.
- Supervises, trains, and develops staff assigned to engagements.
- Assign staff to engagements
- Complete evaluations on staff that have worked on engagements
- Regularly exercise discretion and independent judgment involving corrective measures with client data. Comparisons and evaluating possible courses of action and making decisions after considering various possibilities.
- Also assists partners and managers in resolving client issues and problems; compiles research and prepares reports on various tax, audit or financial issues.
- Offers functional guidance and direction and gives constructive criticism when necessary to less experienced Staff Accountants.
- 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.
- Enhances personnel development and career objectives by developing industry niches in Small Business Services.
- 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.

SUPERVISORY RESPONSIBILITIES _____ Non-Exempt _____ Exempt

EDUCATIONAL REQUIREMENTS

- Bachelor's Degree in Business, Accounting, or Finance, or Master's Degree in Accounting.
- Minimum of forty hours (40) of annual continuing professional education (CPE).
- Participation in career development programs to improve managerial, communication, and interpersonal skills.

EXPERIENCE REQUIREMENTS

- Normally a minimum of two years (2) of public accounting or related experience demonstrating a progression in complexity, scope, and accounting tasks and/or tax knowledge.
- 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

- 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.
- Overtime work, as required, throughout the year. Heavy overtime required during tax season, January 15th – April 15th and audit season, September 1st – 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 a 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: _____