

**Title:** Manager  
**Department:** Assurance & Advisory  
**Reports to:** Assurance & Advisory Partner(s)  
**FLSA Status:** Full time, Exempt  
**Date Revised:** May 2011

**Summary:**

The Manager is the liaison between the Partner, the client, and the professional staff. Managers are responsible for managing multiple auditing and accounting projects and client engagements simultaneously, and scheduling, staffing and coordinating engagement workflow. Managers develop and train staff, and make associations to develop new business for the Firm. Managers play a lead role in maintaining client relationships.

**Essential Functions:**

1. Responsible for all phases of an audit, compilation, or review engagement.
2. Maintains contact with clients throughout the year; possesses a thorough knowledge of the client and all facets of client's business.
3. Demonstrates thorough knowledge and proficiency in advanced technical skills necessary for advising clients.
4. Plans, schedules and staffs engagements using Firm policies and procedures.
5. Maintains familiarity with qualifications of all staff members; reviews staff assignments for appropriateness.
6. Prepares engagement letters for approval by Partner.
7. Evaluates internal controls and work programs prepared by staff.
8. Adheres to engagement time budgets.
9. Supervises staff and provides on-the-job training; reviews work papers and reports prepared by staff.
10. Anticipates problem areas of engagement and questions that will arise.
11. Keeps Partner informed of all the important developments on engagement; analyzes problems and recommends solutions.
12. Adheres to accurate and timely billing and collection processes are made.
13. Ensures that financial statements, reviews, and letters of recommendation are prepared in accordance with professional and Firm standards.
14. Communicates progress of engagements, problems and resolutions to client.
15. Works to develop responsible, trained staff by assisting in performance evaluations.
16. Prepares invoices to clients, communicates details of fees to clients, and assists in collection of overdue accounts.
17. Possesses a complete knowledge of the Firm's philosophy and its opinions on financial matters.
18. Maintains knowledge of general economic and political trends of possible audit or other legislation that could affect the business climate.

**Nonessential Functions:**

1. Works to develop responsible, trained staff by assisting in recruiting, developing training aids, and acting as an instructor in professional development programs.
2. Participates in the Firm's practice development efforts.
3. Promotes the most efficient operations of the Firm and supports compliance guidelines in managing others.
4. Prepares other reports and projects as requested from time to time by the Partners.
5. Performs such other duties as may be assigned.

**Knowledge, Skills and Abilities:**

1. Demonstrated ability to bring in new business to a CPA Firm.
2. Proficiency in use of computers, computer accounting software, and tax software programs.
3. Ability to organize work and projects, prioritize and meet deadlines, and to complete work in an efficient and accurate manner.
4. Ability to reason and effectively multi-task.

**Supervisory Responsibilities:**

1. Responsible for the development, coaching and training of senior, semi-seniors and staff accountants.
2. Must be familiar with the qualifications of all Assurance & Advisory staff members for the development and instruction of their training needs.
3. Participates in reviews and evaluations of accounting professionals.

**Working Conditions:**

1. Frequent same day travel for work at clients' offices, meetings, and seminars using a personal vehicle.
2. Occasional out-of-town travel with overnight stay for work at clients, meetings, or seminars using a personal vehicle.
3. Occasional overtime work required throughout the year. Heavy overtime work required from January 1 to April 15, may be in excess of 55 hours per week.

**Minimum Qualifications:**

1. Generally requires five (5) to seven (7) years experience in public accounting, demonstrating a proven progression in complexity, scope, and number of engagements managed.
2. Minimum of two (2) years experience in a supervisory position.
3. Bachelor's degree in accounting, or Master's degree in accounting.
4. Minimum of forty (40) hours of continuing professional education is required each year to maintain and develop technical and business skills.
5. A current and valid CPA's license is required.

**Success Factors:**

1. Participates in career development program to improve managerial, communication and interpersonal skills.
2. Outstanding oral and written communication skills,
3. Excellent interpersonal skills

This job description does not list all the duties of the job. You may be asked by Partners or peers to perform, or assist in performing, other instructions and duties. You will be evaluated in part based upon your performance of the tasks listed in this job description.

Management has the right to revise this job description at any time. The job description is not a contract for employment, and either you or the employer may terminate employment at any time, for any reason.

Date: May 25, 2011

Employee's Signature: \_\_\_\_\_

Employee's Printed Name: \_\_\_\_\_