MOMENTUM
FINANCIAL GROUP

ROLE: SENIOR **(ACCOUNTANT) MANAGER**

PURPOSE	Manage your portfolio of clients while planning and directing your team of professionals, monitoring their progress and assisting and correcting when necessary with the client's needs in mind.
REPORTS TO/ **ACCOUNTABILITY**	Managing Partner (Geelong)
INDIVIDUAL **QUALITIES**	• Exceptional attention to detail • Confidence to advise clients based on sound knowledge • Excellent written and verbal communication skills • Willingness to learn, adapt, show initiative and be a positive team player and leader • Positive and happy attitude • Highest standard of ethics, confidentiality, and professionalism • Excellent time management skills
KEY DUTIES & **RESPONSIBILITIES**	• Manage and administer a portfolio of clients. Providing technical support, feedback and guidance to team members that work on your clients. • Set, review, meet and oversee productivity and client budget expectations. Ensuring all work is accurately billed. • Manage and review the planning and delegation of workflow. Providing technical support, feedback and guidance to team members when necessary. • Review of all work delegated to and completed by Graduates, Accountants, Senior Accountants and Managers. Take full responsibility and ownership of the completion of delegated jobs. Ensure that all work is error-free, professionally presented and complies with Momentum's procedures and systems. Take full responsibility and ownership of the completion of delegated jobs. • Preparation and review of complex individual, company, trust, partnership tax returns within extremely limited supervision and direction. • Advanced working knowledge of GST, Business Activity Statements and Instalment Activity Statements. • Review of workpapers, analysis of client data and transactions and setting up accounts onto the accounting package in accordance with the organisations standards. • Perform and review compliance and value add work when required. • In-depth analysis of management reports. • Identify, oversee and develop existing and potential business opportunities within the Momentum client portfolio to generate additional revenue. • Detailed knowledge of tax office correspondence and procedures. • Display a high understanding of company secretarial matters. • Maintain up-to-date knowledge of relevant taxation and other relevant legislation and rulings through attendance of monthly Professional Development sessions. Run internal training sessions to ensure knowledge is being transferred to your team. • Oversee and assist with research and accurate interpretation of taxation and other relevant legislation and rulings for clients when required. • Other duties as required
PERFORMANCE **MEASURES**	• Providing high quality and timely service to clients by ensuring all client queries and complaints are dealt with and followed up within 24 hours of receipt. • Maintain client retention - >90% of total client portfolio. • Run internal training sessions monthly to ensure your knowledge is being transferred to staff. Attend 90% of scheduled training. Maintaining your Professional Development via attendance to monthly PD sessions.

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	• Accurately complete weekly invoice listings. Review and liaison with the Client Services Coordinator and Manager to ensure the accounting team meets their weekly and monthly invoicing target. • Achieve a minimum personal productivity of 60% and the monthly invoice targets as agreed upon by you and your supervisor. • Refer 10 clients per quarter to the other service departments/offerings within the organisation. • Continually enhance the range of products and services offered to our clients. • Receive 9 out of 10 positive client feedback when asked if they would refer a friend. • Manage and support the entire Momentum Team to ensure that our clients are always delighted. • Contribute to the happy and positive working environment that exists at Momentum.
QUALIFICATIONS AND **EXPERIENCE**	• Bachelor degree in Commerce / Business with an emphasis in Accounting, CA or CPA completed • Advanced understanding of the Corporations Act, relevant accounting standards, tax legislation and other research as they relate to the work undertaken • Excellent knowledge of taxation legislation • Excellent XERO / MYOB knowledge • Excellent use of Office products