

Copeland Buhl & Company PLLP
POSITION DESCRIPTION

Title:	Senior Accountant
Position:	Compliance
Reports To:	Manager or Senior Manager
Work Location:	Wayzata, MN
Job Code/Classification	Hourly; Professional
Revised:	November 2018

POSITION OVERVIEW

The Senior Accountant is responsible for organizing and driving client deliverables individually or as part of a team. They are the face of the firm and maintain client contact to effectively complete assigned projects.

KEY RESPONSIBILITIES

Financial Performance

- Accountable for project work plans and assigned tasks; including budget and profitability.
- Identify opportunities to improve project profitability.

Client Service Management

- Strong understanding of clients' situation.
- Identify client needs and opportunities.
- Build working relationships with clients.

Business Development

- Identify opportunities to increase service offerings through existing firm services.

Team Development

- Organize and control multiple responsibilities and resources to achieve objectives.
- Provide timely performance feedback to assigned staff.

Personal Effectiveness

- Identify compliance issues, research technical literature and seek guidance.
- Develop deeper technical knowledge and skill set within department.
- Review staff work to ensure quality, thoroughness and completeness.
- Pursue self-development opportunities.

Leadership

- Lead by example, demonstrate enthusiasm and encourage team members.
- Share and transfer knowledge with team members.

Additional roles could include but are not limited to:

- Board initiatives
- Recruiting
- Software Champion
- Training and education
- Onboarding

QUALIFICATIONS

Education:

- Bachelor's degree in accounting.
- Certified Public Accountant (CPA) or Enrolled Agent (EA) preferred.

Experience:

- Served as a Staff Accountant or similar experience.

Production:

- Meet firm standard for chargeable hours and realization.

Skills/Abilities:

- Problem solving ability.
- Has made decision on department assignment.
- Communicate issues, delays and status against expectations with team members.
- A working knowledge of firm products and services in the practice area and a general knowledge of products and services in other practice areas.
- A general understanding of market trends relating to clients and local business initiatives.
- Ability to work independently and take initiative, anticipating and resolving problems.
- Proven ability to manage multiple priorities and assignments.
- High level of ethics, integrity and professionalism.
- Demonstrates organization and administrative skills.
- Displays sound decision-making skills
- Ability to concisely and effectively communicate work performed
- Aligned self-development to support position responsibilities

OTHER INFORMATION

This job description may apply to employees in different departments. The information below is intended to document the most common situations and may vary by position / department. Refer to management or human resources for specific information pertaining to this position.

Also provides support to:	Staff and Partners
Direct reports:	No
Indirect reports:	Yes
Working Environment:	Professional
Physical Demands:	Minimal
External communication and contacts:	Yes
Internal communication and contacts:	Yes
Other information:	n/a

This job description is intended to be a general guideline for applicants, employees and managers. It is not to be construed as an exhaustive list of all duties, expectations or qualifications. This description does not create a contract or guarantee of employment. Management reserves the right to modify job responsibilities, expectations and qualifications.