

Copeland Buhl & Company PLLP
POSITION DESCRIPTION

Title:	Manager
Position:	Compliance
Reports To:	Senior Manager or Director
Work Location:	Wayzata, MN
Job Code/Classification	Salary; Professional Level; Exempt
Revised:	November 2018

POSITION OVERVIEW

The manager is responsible for supervising staff to achieve project profitability, build teams, and develop individuals. The Manager executes technical skills at a **high** level. The Manager is also the main effort in ensuring that firm quality standards are adequately enforced, and deliverables adhere to firm policies.

KEY RESPONSIBILITIES

Financial Performance

- Own the project work plan and ensure assigned tasks and responsibilities are achieved; includes managing the project budget, profitability and engagement risks.

Client Service Management

- Drive client objective through clearly communicated strategy and desired outcome.
- Provide quality service ensuring client understands all aspects of engagement.

Business Development

- Develop professional relationships and nurture long-term relationships with client management.
- Develop solutions for clients and manage the implementation of solutions.
- Leverage business acumen to implement opportunities to sell additional services.
- Communicate cross-selling opportunities to the appropriate team member.

Team Development

- Provide direct oversight of work performed.
- Identify, assess and communicate compliance risks and opportunities.
- Motivate and encourage team members to increase retention and utilization.
- Advise, coach and support team members with technical training and timely performance feedback.
- Support management and human resources in developing initiatives to increase retention, meet resourcing needs, utilization and people development.

Personal Effectiveness

- Accountable for timely completion of client deliverables.
- Develop technical expertise.
- Create shared understanding of technical expertise.
- Develop industry expertise.
- Actively pursue self-development opportunities.

Leadership

- Organize and control multiple responsibilities and resources to achieve defined project objectives.
- Plan engagements – enable the staff on your projects to succeed.
- Train the next generation of managers; ensure that there are team members at lower levels that are receiving coaching, training and mentoring to create continuity on projects.

Additional roles could include but are not limited to:

- Board initiatives
- Recruiting
- Software Champion
- Training and education
- Onboarding
- Service Line Lead
- Career Counselor

QUALIFICATIONS

Education:

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

Experience:

- Served as Senior Accountant or similar experience.

Production

- Meet firm standard for chargeable hours, productivity and realization.

Skills/Abilities:

- Work independently and take initiative, anticipating and resolving problems.
- Proven ability to lead, manage and complete multiple projects.
- Communicate clearly and appropriately.
- Display a high level of ethics, integrity and professionalism.
- Understand and address engagement risks.
- Maintain client relationships.
- Successfully train, evaluate and coach staff.
- Display consistent client service and technical expertise.
- Display decision-making skills and adaptability.
- Display clear understanding of firm services in the practice area and working knowledge of services in other practice areas.
- Maintain a general understanding of market trends including opportunities, global and local business initiatives.
- Display appropriate sense of urgency in fulfilling responsibilities.
- Conduct research to develop options and solutions to clients.
- Aligned self-development plan 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: Yes
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.