

ACCOUNTANT

Team Member Name:	
Employment Status:	Full Time
Reports to:	Jerry Zhao

Overall Objective

To care for a group of Client's needs for a range of services including taxation, financial statements, and business advice

Individual Qualities

- Exceptional attention to detail
- Confidence to advise clients based on sound knowledge
- Excellent written and verbal communication skills
- Willingness to learn, show initiative and be a positive "team player"
- Positive and happy attitude
- Highest standard of ethics, confidentiality and professionalism
- Excellent time management skills

Qualifications & Experience

- Tertiary Accounting Qualifications
- Membership of a Professional Accounting Body
- Experience in the preparation of Financial Statements and Tax Returns
- Excellent knowledge of taxation legislation
- Excellent MYOB / Quickbooks knowledge
- Excellent use of Word, Excel and Outlook

Key Responsibilities & Duties

- Client meetings
- Follow up to clients with queries
- Manage the flow of information between clients and our firm
- Prepare Business Activity Statements (BAS's) and Instalment Activity Statements (IAS's)
- Prepare Financial Statements, including Depreciation Schedules
- Prepare Income Tax Returns
- Prepare CGT calculations and provide advice to clients
- Prepare FBT calculations and provide salary packaging reviews to clients
- Liaise with the ATO on client matters
- Business entity setup and registration
- Computer data input
- Prepare BSA Annual Review Reports
- Prepare ATO applications such as ABN, TFN, GST and PAYG
- Prepare invoices for clients and ensure all work is accurately billed
- Provide general accounting and taxation advice to clients
- Maintain up-to-date knowledge of relevant taxation and other relevant legislation and rulings.
- Research and accurately interpret taxation and other relevant legislation and rulings for clients
- Participate in external and internal training as required
- Ongoing referral of financial planning, loan and insurance leads to our Financial Planning team
- Ensure that all work is error-free and professionally presented and complies with Leader Accountancy's procedures and systems
- Maintain current and accurate files and record and date any actions and detailed file notes
- Prepare work flow reports for your own client work
- Prepare cash flow budgets and profit plains for clients
- Other duties as requested

Position Description

Performance Measures

- Meet the monthly fee target of \$ 13,500 (\$162,000 annually = 45 weeks x 37.5 hours x 60% productivity x \$160 target hourly rate)
- Ensure Graduate/Junior Accountant meet the monthly fee target of \$ 9,000 (\$108,000 annually = 45 weeks x 37.5 hours x 80% productivity x \$80 target hourly rate)
- Achieve write-ups of a minimum of 5% of fees charged
- Ensure that work and lodgement deadlines are met for all clients that you are responsible for
- Contribute to the continual enhancement of the range of products and services offered to our clients
- Support the entire Leader Accountancy Team to ensure that our clients are always delighted
- Contribute to the happy and positive working environment that exists at Leader Accountancy.

Accepted by:

Team Member Signature:

Team Member Name:

Date:

Agreed by:

Manager Signature:

Manager Name:

Jerry Zhao

Date: