

## POSITION DESCRIPTION

<b>Position Title</b>	<b>Senior Accountant</b>
<b>Reports to</b>	Manager / Partner in Charge
<b>Position Overview</b>	<p>To assist the Partners and Managers in caring for a portfolio of clients on a range of compliance and business advisory issues.</p> <p>The role may include all facets of accounting, taxation, computing consulting and other areas which from time to time could be expected to be carried out by an employee in your position.</p> <p>Contribute to the supervision and development of graduate/undergraduate accountants.</p>
<b>Essential Qualifications &amp; Experience</b>	<p>University degree in relevant accounting, business or commerce discipline.</p> <p>CA/CPA Qualification</p> <p>3 years + accounting experience</p> <p>Understanding of, and experience with management accounting systems and development of management reports.</p> <p>Experience in the development and maintenance of budgets for a medium sized enterprise.</p>

## Task Responsibilities

<b>Accounts Preparation</b>	<p>Care for a portfolio of clients, preparing their accounts and utilising systems including:</p> <ul style="list-style-type: none"> <li>• Accounts Preparation</li> <li>• Accounts Workpapers – Indexing and Completion</li> <li>• Accounts Preparation – Review General Ledger</li> <li>• BAS Preparation</li> <li>• Budgets &amp; Cashflow Forecasts</li> <li>• Attending to the requirements of Companies, Trusts, Partnerships and Sole Traders</li> <li>• Preparation of Annual Profit Estimates</li> </ul>
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<b>Business Advisory</b>	<p>Care for a portfolio of business clients, advising them on issues including:</p> <ul style="list-style-type: none"> <li>• Preparation of Business Plans</li> <li>• Preparation of Business Appraisals</li> <li>• Preparation of Information Memorandums for sale of businesses</li> <li>• Finance Applications</li> <li>• Assist in the preparation of tax advice.</li> <li>• Monitor Client Management Reports for underlying business improvement opportunities.</li> <li>• Prepare client business benchmarking reports.</li> <li>• Evaluate client accounting systems.</li> <li>• Assist with general small business requirements.</li> </ul> <p>Assisting and advising clients before, during and after Australian Tax Office audits:</p> <ul style="list-style-type: none"> <li>• Preparation of ATO compliance reviews</li> <li>• Routine GST audits</li> <li>• Income tax investigations</li> </ul>
<b>Personal Income Tax Returns (ITR)</b>	<p>Manage a range of Personal Income Tax Returns (ITR) issues, including:</p> <ul style="list-style-type: none"> <li>• Personal Income Tax Preparation</li> <li>• Client assessment advice</li> <li>• Indexing</li> <li>• Preparation of income tax estimates</li> </ul>
<b>FBT System</b>	<p>Utilise FBT System.</p> <p>FBT information gathering, calculations and completion.</p>
<b>Wages and PAYG Withholding</b>	<p>Preparation of Annual PAYG Summaries.</p> <p>Preparation of Workers Compensation Declaration and Estimate Certificates.</p> <p>Payment of PAYG tax instalment for clients (as required).</p>
<b>Superannuation</b>	<p>Care for a portfolio of clients on a range of superannuation issues, including Self Managed Superannuation Funds</p>
<b>Other related responsibilities</b>	<p>Contribute to the preparation of job budgets.</p> <p>Work with specialist divisions with the firm.</p> <p>Maintain knowledge of software packages used by clients.</p> <p>Keep abreast of technical changes and apply current requirements to client situations.</p>
<b>Key Performance Indicators</b>	<p>Targets set and reviewed in accordance with the Performance Framework.</p>

## General Responsibilities and Expectations

- Be familiar with and adhere to R&M Policies and Procedures.
- Be familiar and promote R&M values at all times
- Communicate professionally with clients and colleagues and maintain the highest level of confidentiality at all times
- Build positive productive working relationships internally and externally, while possessing a positive and mature attitude to the role
- Demonstrate a commitment to efficiency and continued professional development by attending and actively participating in training, taking responsibility to seek self-development opportunities & keeping up to date with technical matter.
- Conduct your business in compliance with ethical practices
- Monitor and adhere to procedures and workflow deadlines
- Attend/support relevant RM related events
- Follow all reasonable instructions of Managers, Partners and the General Manager

### Agreement to this Position Description

I have read and understood this Position Description.

I understand that this document provides general information and that it may be altered at any time at the discretion of the Firm.

I agree to perform to the best of my ability and to deliver the responsibilities described in this Position Description, in accordance with Firm policies and procedures and all reasonable management directions.

Agreed by: \_\_\_\_\_

<b>Employee</b>	<b>Signature</b>	<b>Date</b>
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Signed on Behalf of Roberts and Morrow:

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<b>Name</b>	<b>Signature</b>	<b>Date</b>