

## JOB DESCRIPTION

<b>Job title:</b>	Intermediate Accountant
<b>Responsible to:</b>	Partners
<b>Leech &amp; Partners Mission &amp; Key Goal:</b>	<p>Our mission is to provide solutions, not products, and to provide answers, not information.</p> <p>Our 5 Strategic themes create a framework of growth. Our themes are:</p> <ul style="list-style-type: none"> <li>• Protect our Team</li> <li>• Grow Revenue and Returns</li> <li>• Build Partnerships</li> <li>• Grow our People</li> <li>• Reinvest in the Business</li> </ul> <p><i>Adding Value Together</i> - work with clients, internal and external stakeholders, to plan for sustainable business growth. Identify clients' business issues, create plans and making change and improvement happen.</p>

### Key Relationships

The position reports to the Partners and works closely with other team members. The Intermediate Accountant will also develop strong working relationships with their respective clients and other supporting stakeholders.

### Key Result Areas

Key Responsibilities:	Jobholder Is Successful When:
<p><b>1. Client Management &amp; Understanding</b></p> <ul style="list-style-type: none"> <li>• Build relationships with a portfolio of Clients, based on trust and achieving the best outcome for each Client.</li> <li>• Develop an understanding of each Client, showing a genuine interest in their business, and how organisation structures fit with each client.</li> <li>• Explore an understanding of the wider business proposition with regards to value-add work.</li> <li>• Provide accurate and useful numerical and analytical feedback to the Client.</li> </ul>	<ul style="list-style-type: none"> <li>• Advice provided is at the appropriate level of expertise, plus a full understanding and awareness of conflicts of interest mitigating risk to Leech &amp; Partners.</li> <li>• Expectations and any delays in achieving agreed timeframes are clearly communicated.</li> <li>• Respected by Clients, with positive feedback received due to the completion of engagements within agreed timeframe.</li> <li>• Positive communication with management team, with everyone feeling informed.</li> </ul>

<ul style="list-style-type: none"> <li>• Provide a reliable service line to Clients and the business community.</li> </ul>	<ul style="list-style-type: none"> <li>• Any risks are mitigated by escalating any concerns to appropriate person within a suitable timeframe.</li> <li>• Show curiosity, demonstrating initiative and flexibility in manner and approach to work in order to provide the best service and delivery.</li> </ul>
<p><b>2. Technical Accounting and Advisory</b></p> <ul style="list-style-type: none"> <li>• Prepare intermediate level draft and final financial statements using ledger systems (Xero and MYOB AO) using the Leech &amp; Partners standard including setting up new client ledgers in these systems.</li> <li>• Preparation of financial statements using CA ANZ Special Purpose Financial Reporting Framework.</li> <li>• Understand tax entity profiles when preparing jobs.</li> <li>• Uses CCH electronic workpapers to assist in preparing of financial statements.</li> <li>• Prepare tax returns for Individuals, Trusts, Partnerships, Companies, Incorporated Societies (as necessary) using Xero Practice Management and understand filing requirements.</li> <li>• Prepare GST, FBT &amp; RWT Returns as necessary, plus preparation of dividends and/or DWT Returns, and understanding filing requirements.</li> <li>• Prepare other necessary advisory jobs at an intermediate level; for example, cashflow reports, budgets, provisional tax estimates.</li> <li>• Application of relevant tax requirements and policy under current legislation.</li> <li>• Keep up to date with all changes of accounting software systems, and application of these.</li> </ul>	<ul style="list-style-type: none"> <li>• Goes beyond processing of accounts, showing an understanding of the 'why' and demonstrating personal thought processes and ideas.</li> <li>• Learning from previous review points showing a reduction in review points on jobs</li> </ul>

<ul style="list-style-type: none"> <li>• Manage Client workflow list to meet deadlines and expectations of both the Client and Leech &amp; Partners.</li> <li>• Consider job budget in preparation of all jobs.</li> <li>• Use IRD, ACC and / or Companies Office websites, to assist in job preparation.</li> <li>• Research appropriate tax issues, as required.</li> <li>• Demonstrate an understanding of the different types of provisional tax options and UOMI implications, at an appropriate level.</li> </ul>	
<p><b>3. Teamwork</b></p> <ul style="list-style-type: none"> <li>• Role model behaviours to junior team members, working with them to understand proper processes.</li> <li>• Create a positive team atmosphere, including team inclusiveness, stimulating involvement, encouraging shared respect, and demonstrate Leech &amp; Partners values.</li> </ul>	<ul style="list-style-type: none"> <li>• Present a "can do" attitude and culture amongst more junior team members.</li> <li>• Positive team culture.</li> </ul>
<p><b>4. Personal Development</b></p> <ul style="list-style-type: none"> <li>• Actively manage personal performance and career planning. Set development plans and participate in the appraisal process, holding mentors to account.</li> <li>• Prepare for and actively participate in meetings to discuss performance, seeking more regular feedback and / or meetings as necessary.</li> <li>• Create personal goals that have a good stretch, and firmly establish how these will be achieved within specified timeframe.</li> <li>• Identify technical development, both structured and unstructured, plus any training or support required to achieve goals that support development plans.</li> </ul>	<ul style="list-style-type: none"> <li>• Regular conversations are had, aligning actions and behaviours with Leech &amp; Partners values and goals.</li> <li>• Understand the need to develop professionally and technically to meet the needs of clients, keeping up to date with any changes and market trends.</li> <li>• Areas for improvement is acknowledged and plans in place to remedy.</li> </ul>

<p><b>5. Other Duties, Health &amp; Safety, and Leech &amp; Partners Policies</b></p> <ul style="list-style-type: none"> <li>• Duties are not limited to those specified, so further tasks may be assigned on a project or ongoing basis.</li> <li>• Ensure that all Health and Safety requirements as outlined in the Health and Safety policy are complied with.</li> <li>• Ensure all Leech &amp; Partners policies are complied with.</li> </ul>	<ul style="list-style-type: none"> <li>• A proactive flexible approach is undertaken to achieve Leech &amp; Partners business objectives.</li> <li>• Awareness of Health and Safety requirements and procedures.</li> <li>• Awareness and compliance with all Leech &amp; Partners policies.</li> </ul>
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## Person Specification

### Qualifications

Essential	Desirable
<ul style="list-style-type: none"> <li>• Tertiary qualification in Accounting</li> </ul>	<ul style="list-style-type: none"> <li>• Chartered Account (or working towards)</li> </ul>

### Knowledge / Experience

- Minimum of 2 years in a client facing role
- Experience in accounting systems, MYOB and Xero
- Microsoft Suite

### Key Skills / Attributes / Job Specific Competencies

Communication	<ul style="list-style-type: none"> <li>• Develop strong written and verbal communication skills, including the ability to change tone with different clients and team members. Self-review work, including grammar.</li> <li>• Good attention to detail.</li> <li>• Engage in team discussions and trainings, providing personal views.</li> </ul>
Problem Solving	<ul style="list-style-type: none"> <li>• Apply knowledge practically.</li> <li>• Maintain an open mind and logical approach to different work situations.</li> <li>• Remain calm in problem solving situations and contribute to solutions logically with determination to achieve a result.</li> <li>• Understand the appropriate point at which to seek assistance.</li> </ul>
Organisation	<ul style="list-style-type: none"> <li>• Multitask while remaining professional.</li> </ul>

	<ul style="list-style-type: none"> <li>• Understand the importance of priorities and can prioritise.</li> <li>• Effectively manage workflow and report to managers as necessary, including if any concerns.</li> <li>• Work under pressure at busy times and going above and beyond at times.</li> </ul>
Professionalism	<ul style="list-style-type: none"> <li>• Behave in a professional way in front of clients and business relationships.</li> <li>• Understand the effect behaviours and approach of day-to-day work has on others.</li> <li>• Approachable and listens to other opinions objectively.</li> <li>• Take on feedback constructively.</li> </ul>

**Acceptance of Job Description**

*From time to time, it may be necessary to consider changes in the job description in response to the changing nature of our work environment – including technological requirements or statutory changes.*

Approved by:

**Employee Name** \_\_\_\_\_

Job Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Approved by:

**Name** \_\_\_\_\_

Job Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_