JOB DESCRIPTION

Job title:	Senior Accountant
Responsible to:	Partners
Leech & Partners Mission & Key Goal:	Our mission is to provide solutions, not products, and to provide answers, not information. Our 5 Strategic themes create a framework of growth. Our themes are: • Protect our Team • Grow Revenue and Returns • Build Partnerships • Grow our People • Reinvest in the Business *Adding Value Together* - 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.

Key Relationships

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

Key Result Areas

Key Responsibilities:	Jobholder Is Successful When:
1. Client Management & Understanding • Build strong relationships with a portfolio of Clients, based on trust and achieving the best outcome for each Client. • Develop a robust understanding of each Client, making informed decisions. Show a genuine interest in the Clients business by understanding; business models in the context of decisions around the balance sheet and KPI's, business goals, exit strategies, and propensity towards risk and planning around this.	• Advice provided is at the appropriate level of expertise, plus a full understanding and awareness of conflicts of interest means mitigating risk to Leech & Partners. • Expectations and any delays in achieving agreed timeframes are clearly communicated with Clients. • Respected by Clients, with positive feedback received due to the completion of engagements within agreed timeframe. • Positive communication with all Partners, with everyone feeling informed.

• Identify opportunities and explore better ways of doing things that will enhance Clients' business. • Provide accurate and useful numerical and analytical feedback to the client. • Assist clients with accounting system requirements or refer them to the correct person who may have more expertise in certain systems.	• Any risks are mitigated by escalating to an appropriate person and within a suitable timeframe. • Work procedures and processes are maintained at a consistently high standard. • Demonstrate initiative and flexibility in manner and approach to work in order to provide the best service and delivery.
2. Technical Accounting and Advisory • Prepare senior level (more complex) draft and final financial statements using ledger systems (Xero and MYOB AO) using the Leech & Partners standard including setting up new client ledgers in these systems. • Preparation of financial statements using CA ANZ Special Purpose Financial Reporting Framework. • Understand tax entity profiles when preparing jobs. • Uses CCH electronic workpapers to assist in preparing of financial statements. • Prepare tax returns for Individuals, Trusts, Partnerships, Companies, Incorporated Societies (as necessary) using Xero Practice Management and understand filing requirements. • Prepare GST, FBT & RWT Returns as necessary, plus preparation of dividends and/or DWT Returns, and understanding filing requirements. • Prepare other necessary advisory jobs for example, cashflow reports, budgets, provisional tax estimates. • Application of relevant tax requirements and policy under current legislation. • Keep up to date with all changes of accounting software systems, and application of these.	• Goes beyond processing of accounts, showing an understanding of the 'why' and demonstrating personal thought processes and ideas. • Self-review and personal thinking with a reduced need for assistance.

• Manage Client workflow list to meet deadlines and expectations of both the Client and Leech & Partners. • Consider job budget in preparation of all jobs. • Use IRD, ACC and / or Companies Office websites, to assist in job preparation. • Research appropriate tax issues, as required. • Demonstrate an understanding of the different types of provisional tax options and UOMI implications.	
3. Process Enhancements & Continuous Improvement • Assist with the delivery of projects and processes, actively working towards achieving firmwide goals and direction within agreed timeframe. • Identify new ways of working both individually and as a team, communicating these through to the Management Team. • Maintain a general understanding of market trends – industry and the broader business environment, including global and regional business.	• The delivery of all procedures and processes is done so at a consistently high standard, continually striving for best outcome. • A positive influencer of change, bringing the wider team on the journey.

4. Leadership • Demonstrate characteristics of leadership – including creating team inclusiveness, stimulating involvement, encouraging shared respect, and demonstrate Leech & Partners values. • Assist with reviewing jobs for Junior and Intermediate staff, providing feedback and review notes that supports the growth of their capability (as required as depends on the need). • Assist with mentoring and training of junior and intermediate staff, role modelling positive behaviours.	• Have an approachable "open door" manner to more junior team members and they look up to and respect the Senior Client Manager. • Team members feel respected, valued, and appreciated. • Present a "can do" attitude and culture amongst more junior team members. • Provide review points and feedback in a timely manner.
5. Development • Actively manage personal performance and career planning. Set development plans and participate in the appraisal process. • Prepare for and actively participate in meetings to discuss performance, seeking more regular feedback and / or meetings as necessary. • Create personal goals that have a good stretch, and firmly establish how these will be achieved within specified timeframe. • Identify technical development, both structured and unstructured, plus any training or support required to achieve goals that support development plans.	• You have regular conversations to align your actions and behaviours with Leech & Partners values and goals. • Understand the need to develop professionally and technically to meet the needs of clients, keeping up to date with any changes and market trends. • Clients have confidence in Senior Client Managers ability. • Areas for improvement is acknowledged and plans in place to remedy.
6. Other Duties, Health & Safety, and Leech & Partners Policies • Duties are not limited to those specified, so further tasks may be assigned on a project or ongoing basis. • Ensure that all Health and Safety requirements as outlined in the Health and Safety policy are complied with. • Ensure all Leech & Partners policies are complied with.	• A proactive flexible approach is undertaken to achieve Leech & Partners business objectives. • Awareness of Health and Safety requirements and procedures. • Awareness and compliance with all Leech & Partners policies.

Person Specification

Qualifications

Essential	Desirable
• Tertiary qualification in Accounting	• Chartered Account or equivalent

Knowledge / Experience

- Minimum of 4 years in a client facing role
- Experience in accounting systems, MYOB and Xero
- Microsoft Suite

Additional Attributes / Job Specific Competencies

Communication	• Understand the appropriate tone and mode of communication for team members, clients, and business relationships. • Has a good use of written and oral communication. • Written work grammatically accurate. With good attention to detail. • Participate in team discussions and trainings, providing personal views and influence when necessary.
Problem Solving	• Apply knowledge practically. • Maintain an open mind and logical approach to different work situations. • Understand the business proposition and materiality
Organisation	• Multitask while remaining professional. • Understand the importance of priorities and can prioritise. • Effectively manage workflow and report to managers as necessary, including if any concerns. • Work under pressure at busy times and going above and beyond at times.
Professionalism	• Behave in a professional way in front of clients and business relationships. • Understand the effect behaviours and approach of day-to-day work has on others. • Approachable and listens to other opinions objectively. • Take on feedback constructively.

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* __________