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Job Title: Manager
Department: Combined Services
Supervisor: Partners
Pay Class/Status: Salary-Exempt

Summary Description

The role of manager is one that requires a high degree responsibility and professionalism. It is critical that the person hired to do the job understands this and is willing to work for the betterment of the firm. Primarily responsible for client relationships and engagement and development of senior accountants. Working closely with seniors and staff, directing their work. Supervise and review engagement planning, train and evaluate senior accountants and staff. Continuously striving to increase technical competence and skill, as well as developing leadership skills, while strengthening client relationships, and developing personnel.

Key Result Areas

- Compilation, review and audit of client financial statements.
- Prepares income tax returns for corporations, partnerships, individuals and trusts, as well as various other required tax filings.
- Delivery of business advisory services.
- Undertakes special accounting projects.
- Personnel development responsibilities.

Major Duties and Responsibilities

Financial Statement Preparation

- Managing and driving the success of multiple engagements.
- Manages and or prepares working papers ensuring that the firm's high quality standards are met.
- Prepares financial statements in conformity with GAAP or other approved principle.
- Keeps abreast of latest development as they affect GAAP and the Firm's standards and policies.
- Manages the compilation, review, and audit of client Financial Statements.

Income Tax Preparation

- Conducts client tax consultations.
- Manages and or prepares tax working papers ensuring that the firm's high quality standards are met.
- Accurately manages and or prepares income tax returns for corporations, partnerships, individuals and trusts, as well as various other required tax filings.
- Manages and or prepares income tax projections for clients.

Manager (continued)

Major Duties and Job Responsibilities

Income Tax Preparation

- Manages and or undertakes tax research as assigned or deemed necessary to ensure that tax return preparation is accurate and compliant; recognizing that research is an absolute requirement.
- Manages the preparation and delivery of Income Tax services.

Business Advisory Services

- Develops an understanding of client's business and becomes a "functional expert" in the area.
- Manages and or performs limited procedural reviews, assessing and comparing operational performance to client and industry standards.
- Manages and or prepares budgets, forecasts, and projections.
- Renders buy / sell consultations.
- Communicates with client personnel, building trust, and developing relationships while providing exceptional client services.
- Promotes new ideas and business solutions that result in extended services to existing clients.
- Contributes towards enhancing the efficiency and delivery of work.
- Manages the preparation and delivery of Business Advisory services.

Special Projects Assigned

- Manages and undertakes research projects of topics including GAAP and the Internal Revenue Code.
- Manages and or conducts special projects as assigned.

Personnel Development Responsibilities

- Attracts, develops, and retains top talent.
- Manages audit planning, fieldwork and reporting.
- Manages and reviews the audit and tax work product of seniors and staff, advising and correcting as needed, ensuring that work is processed timely and accurately in submitting for partner review.
- Responsible for the daily engagement, supervision and development of seniors and staff.
- Acknowledges and disciplines seniors and staff.
- Trains, coaches, and mentors seniors and staff while appraising performance.
- Meets deadlines, and accelerates delivery of services by monitoring and driving the workflow of seniors and staff.

Competencies

- Analytical – Synthesizes complex and diverse information; collects and researches data; uses intuition and experience to complement data; follows work flows and procedures.

Manager (continued)

Competencies

- Problem Solving – Identifies and resolves problems in a timely manner; gathers and analyzes information skillfully; develops alternative solutions; works well individually and in group problem solving situations; uses reasons even when dealing with emotional topics.
- Technical skills – Assesses own strengths and weaknesses; pursues training and development opportunities; strives to continuously build knowledge and skills; shares expertise with others.
- Judgment – Displays willingness to make decisions; exhibits sound and accurate judgment; supports and explains reasoning for decisions; includes appropriate people in decision-making process; makes timely decisions.
- Professionalism – Approaches others in a tactful manner; reacts well under pressure; treats others with respect and consideration regardless of their status or position; accepts responsibility for own actions; follows through on commitments.
- Dependability – Follows instructions, responds to management direction; takes responsibility for own actions; keeps commitments; commits to necessary hours of work when necessary to reach goals; completes tasks on time or notifies appropriate person with an alternate plan.
- Quality – Demonstrates accuracy and thoroughness; looks for ways to improve and promote quality; applies feedback to improve performance; monitors own work to ensure quality.
- Initiative – Volunteers readily; undertakes self-development activities; seeks increased responsibilities; takes independent actions and calculated risks; looks for and takes advantage of opportunities; asks for and offers help when needed.

Commitments

- Initiates "cross selling" and the "add on" of business services to existing clients as well as new clients.
- Regularly and conscientiously devotes time, energy and attention to Professional Development, being actively involved in community activities while strengthening and deepening bonds with clients.
- Acutely aware of the importance of developing career building goals, dedicating the necessary resources, and working continuously towards achieving them.
- Familiarity and adherence to the independence, integrity and objectivity rules, regulations, interpretations, and rulings of the AICPA, and the State Board of Accountancy.
- Treats all co-workers and clients fairly, courteously, and with respect.
- Models superior client service behavior for all co-workers by maintaining positive relationships with clients, employees, supervisors and partners.
- Strives to be fully engaged with the firm mission, vision, and core values.
- Honest and fair in all business dealings.

Qualifications and Role Requirements

- Bachelor's degree in the field of accountancy with proven academic excellence.

Manager (continued)

Qualifications and Role Requirements

- Bachelor's degree in a related field of study with adequate accounting studies or experience that allows for performance of required job duties, advanced business degree is a plus.
- Certified Public Accountant strongly encouraged.
- Proven ability to prioritize, work independently in a deadline driven environment, while handling multiple projects and priorities.
- Excellent verbal and written communication skills, with the ability to build relationships, and build teamwork and camaraderie.
- Excellent technology skills including demonstrated proficiency in Excel and other MS Office programs.
- Ability to manage within budgetary and time constraints while providing a high-level client experience.
- Demonstrated ability to manage and develop staff.
- Demonstrated leadership ability.
- Excellent attention to detail.

Working Conditions

- Frequently works on a computer in an office-type setting.
- Frequent client contact.
- Frequent local commuting to client locations and periodic travel out of town.
- Overtime required during tax season, and as necessary throughout the year.

Every firm member who works for Rogers, Clem & Company works not only for a particular team or partner, but also for the firm as a whole. Accordingly, firm members are expected to act in the best interests of the firm, even if doing so requires actions and behaviors not listed in the above Role Description. This Role Description is provided as a tool to assist the employee in understanding the position and is subject to revision by the management when client service needs change. In addition to the outlined essential role functions, the employee is required to complete all additional tasks assigned by his/her supervisor, as the supervisor sees fit for the position. Failure to comply with job duties may result in discipline at the discretion of Rogers, Clem & Company.