



## **STAFF ACCOUNTANT**

### **JOB SUMMARY**

We are seeking an experienced Staff Accountant to join our team. The Staff Accountant will play a pivotal role in supporting our clients' financial needs through precise bookkeeping, accurate accounting, and strategic coaching services. The ideal candidate will possess a strong foundation in accounting principles, excellent organizational skills, and a passion for helping small entities thrive.

### **DUTIES AND RESPONSIBILITIES**

- 1. Bookkeeping and Accounting:**
  - Perform day-to-day bookkeeping tasks, including recording financial transactions and maintaining accurate ledgers.
  - Reconcile bank statements, credit card statements, and other financial records.
  - Prepare and analyze financial statements, ensuring accuracy and compliance.
- 2. Client Interaction:**
  - Collaborate with clients to gather financial information and address inquiries.
  - Provide ongoing support and guidance to clients, assisting them in understanding their financial statements and making informed business decisions.
  - Assist in the development of financial strategies to enhance clients' financial performance.
- 3. Strategic Coaching:**
  - Work closely with clients to identify opportunities for growth and improvement.
  - Provide strategic coaching to help clients achieve their financial goals and navigate challenges.
  - Offer insights on budgeting, cash flow management, and financial planning.
- 4. Compliance and Reporting:**
  - Ensure compliance with accounting standards, tax regulations, and reporting requirements.
  - Stay informed about changes in accounting regulations and communicate their impact to clients.
- 5. Collaboration:**
  - Collaborate with team members to share insights, best practices, and contribute to the overall success of the firm.
  - Participate in internal meetings and training sessions to stay current on industry trends and firm policies.

## **MINIMUM REQUIREMENTS**

- Associate or Bachelor's degree in accounting, Finance, or a related field.
- Previous experience in accounting and bookkeeping roles.
- In-depth knowledge of small business accounting standards.
- Strong analytical and problem-solving skills.
- Excellent communication and interpersonal skills.
- Detail-oriented with a commitment to accuracy.
- Possess self-management skills and ability to work with limited supervision.

## **OTHER JOB REQUIREMENTS**

- Expert knowledge and understanding of accounting processes and required documentation.
- Ability to manage multiple clients/projects at a time with great time management and organizational skills.
- Excel, Word, Drake, QuickBooks and/or similar accounting/tax software knowledge
- Detail-oriented with an ability to be a self-starter, able to create efficiencies or solutions for existing or unexpected scenarios.
- Communicate effectively and professionally in writing, emailing, texting, and speaking on the phone.
- Additional duties as required by the job and as assigned by partner or client.
- Effective time management skills.

## **DESIRED REQUIREMENTS**

- Certified Public Accountant
- Public accounting experience