

POSITION DESCRIPTION

Job Title:	Manager	Reports to:	Partner
Approved by:	Stephen Bushell, Partner	Date approved:	January 2021

Company Overview

DFK Gooding Partners is a leading accounting, taxation and business advisory firm based in Perth. We specialise in providing services to a portfolio of sophisticated clients including family controlled and privately owned small businesses and high net-worth individuals that require the highest level of personal service and attention. We offer a full range of accounting services including Business Advisory, Taxation, Superannuation, Corporate Finance and Corporate Secretarial. We are proud of our professional and innovative approach and know that our team members are the reason for our success. Our team is dynamic, energetic and friendly as well as being professional and very technically skilled. As an affiliated member of the DFK International group, DFK Gooding Partners offers a network of accountants in over 300 offices across the world.

Job Overview

The Manager is responsible for applying the management and application of accounting principles and procedures to analyse financial information, prepare accurate and timely financial reports and statements and ensure appropriate accounting control procedures. Management of staff allocation of work and development of client relationships.

Activities include:

- Coaching/ management of accountants at all levels
- Monitoring staff performance
- Exploring issues and reasons for drops in productivity
- Liaising with clients, identifies value adding opportunities and builds relationships with clients and senior management
- Updating knowledge base, work practices and procedures for changes in taxation, accounting, ASIC etc. and feeds information down to staff, clients and partners
- Being aware of industry issues for major clients
- Review and update firm software and procedures for changes to keep ahead
- Overseeing job allocations and staff resources
- Ensuring work processes and procedures are adhered to through managers and senior staff
- Building networks and client base

Key Accountabilities	Expected Outputs and Measurement
<p>Teamwork</p> <ul style="list-style-type: none"> • develops strong working relationships with all employees • works well with other managers and fosters teamwork among the management team • recognises and reinforces the achievement of others 	<p>Works cooperatively with all staff, identifying where additional support or training is required.</p> <p>Conflict and issues are resolved quickly and respectfully with minimal disruptions</p> <p>Uses different communication styles and approaches when dealing with different staff</p> <p>Provision of appropriate and timely feedback. Openly discusses staff issues, problems, concerns or training needs with HR/Partners and other managers.</p>

<p>Commitment</p> <ul style="list-style-type: none"> • accepts responsibility • behaves professionally • devotes time and energy to the requirements of DFKGP 	<p>Behaves professionally and can be relied upon to honour commitments</p> <p>Proactively identifies upcoming impacts on client and workflow of staff across multiple levels</p> <p>Shows commitment to work and high standards of performance.</p> <p>Devotes time outside traditional work hours for personal development or to meet client or firm expectations</p>
<p>Team Management & Development</p> <ul style="list-style-type: none"> • demonstrates commitment to developing self and others in the team • provides redirection and reinforcement feedback as required • ensures all assigned team members are performing at full potential • work with assigned team members to ensure they meet productivity budgets • builds a positive workforce 	<p>Continually builds management skills</p> <p>Provides constructive feedback of both positives and negatives regarding technical, procedural or behavioural requirements</p> <p>Liaises with the HR Manager to find solutions to team and individual issues</p> <p>Identifies training gaps with individuals and across levels and works with HR and management group to identify possible solutions</p> <p>Positively contributes to management meetings</p>
<p>Learning & Development</p> <ul style="list-style-type: none"> • takes responsibility and is proactive about technical and self-development • values and participates positively in all training and development programs • develops others through direction and on-the-job coaching 	<p>Attends external training sessions and develops speciality</p> <p>Actively participates in all staff training, including facilitating discussions to ensure junior staff are actively involved in training</p> <p>Presentation of effective training sessions including overseeing and advising Accountants who are presenting</p>
<p>Work Methodology</p> <ul style="list-style-type: none"> • maintains an accurate and consistent methodology to all jobs • manages all jobs to meet budget and deadlines • anticipates and plans for issues and complications • identifies risk and acts to avoid or minimise • produces and/or reviews work paper files in accordance to DFKGP processes and standards 	<p>Reviews job files promptly explaining issues with the accountants effectively</p> <p>Identifies client issues and researches them prior to presenting them to Partners/Associates</p> <p>Raises issues early with Partners or clients and takes the lead to develop solutions</p> <p>Produces results with minimum client impact and in an effective and efficient manner</p> <p>Keeps staff informed on the progress of the job as necessary.</p> <p>Ensures debriefs are carried out on most jobs.</p>
<p>Work Management</p>	<p>Timesheets are approved on time and accurately.</p>

<ul style="list-style-type: none"> delivers jobs within allocated timeframe and budget communicates workload and timeframe conflicts with other managers and partners reacts flexibly when dealing with problems and changes in priorities 	<p>Excess time on a job or on general admin that is identified is addressed promptly with staff member.</p> <p>Takes ownership of assignments and keeps Partners informed of progress. Work deadlines are met.</p> <p>Monitors client tax deadline dates.</p> <p>Identifies where administration support is required</p>
<p>Process and Improvement</p> <ul style="list-style-type: none"> understands the value and importance of required processes and procedures suggest improvements to processes and procedures when identified 	<p>Electronic work papers maintained. Client brief's regularly updated</p> <p>Ensures engagement documents reflect current service offering to individual clients</p> <p>Support and contribute to efficiency programs. Uses carry forward items to propose job efficiencies for next years work</p>
<p>Financial Results</p>	<p>Achieves productivity budget of 65%</p> <p>Oversees the productivity budget of reporting staff</p> <p>Manages WIP and time of job in the office, identifies impact on the fee to the client early.</p>
<p>Financial Controls</p> <ul style="list-style-type: none"> maintains control of variances less than 15% of write offs completion of detailed fees to the standard and timeframe required by the Partner manages team members to complete fees to the required standard and timeframe 	<p>Manage fee negotiations and ensure draft fees meet client and firm expectations</p> <p>Identifies client impacts to job turnover and creates strategies and opportunities to get work in early.</p>
<p>Business Growth</p> <ul style="list-style-type: none"> Generates additional fees from own initiative from new and existing clients. Amount as agreed with Partners. presents positive image of self and DFKGP 	<p>Appropriate communication with clients and other stakeholders where required</p> <p>Determine opportunities to provide value added services to clients</p>

Knowledge, Skills & Experience

Skills	Experience	Qualifications
<ul style="list-style-type: none"> ▪ attention to detail and accuracy ▪ time management, planning and organizing ▪ strong written and verbal communication skills ▪ job monitoring and progression of job through process ▪ problem identification and analysis ▪ judgment and problem-solving ▪ supervisory and delegation skills ▪ client relationship skills ▪ strong research skills ▪ personal learning and development ▪ Partner management ▪ Negotiation skills 	<ul style="list-style-type: none"> ▪ knowledge of accepted accounting practices and principles ▪ knowledge of economic principles ▪ knowledge of tax practices and principles ▪ knowledge and experience of related computer applications ▪ typically 3 + years' experience in the management of financial systems and budgets, financial reporting, financial data analysis, taxation and providing financial advice 	<ul style="list-style-type: none"> ▪ Accounting degree or equivalent ▪ CA qualified ▪ Specialty/additional qualification (if appropriate)