

## OPPORTUNITY PROFILE

**Full Service Chartered Professional Accounting Firm**

**Senior Manager, Assurance**

## ABOUT THE ORGANIZATION

Our client is a full-service chartered professional accounting firm located in South Edmonton, dedicated to serving their client needs. They provide financial and management advice to small and medium sized businesses throughout Alberta and beyond.

Our client provides financial and business advice to Alberta and Western Canadian companies in almost every industry. Whether it is oil and gas, agriculture, architecture, medical or dental, manufacturing, non-profits or retail, their niche expertise ranges widely. Clients get the specialized advice they need to achieve business success.

## THE OPPORTUNITY

Reporting to the Partnership Group, the Senior Manager will take responsibility for directing several accounting and assurance engagements, of various types, size and complexity. They will be a key part in establishing and fostering ongoing positive client relationships.

The Senior Manager will lead, direct and provide mentorship and guidance to articling students and recent graduates, supporting them in their development as accounting professionals.

## KEY ROLES & RESPONSIBILITIES

### Technical

- Plans and oversees high risk review engagements.
- Prepares various complex special purpose financial statements, forecasts, other special reports and advice to clients.
- Prepares complex client correspondence including proposals, reports, discussions on technical issues and recommendations.
- Performs detailed reviews of moderate to high risk notice to reader and review engagements.
- Performs high level review of sections previously reviewed by supervisor.
- Ensures draft financial statements require no further change.
- Completes second reviews on assurance engagements as assigned.
- Applies accounting principles and assurance procedures to ensure client files are properly prepared.
- Identifies issues and implements solutions in consultation with Partner (as required).
- Researches and interprets accounting and assurance standards.
- Resolves open items and issues on the engagement.

### Client Service

- Maintains knowledge of client, clients' businesses and the overall business environment.
- Maintains a positive working relationship with all clients and their staff.
- Functions as the primary contact on engagements.
- Leads pre & post engagement discussions on the work and how to improve service to the client.
- Schedules on-site work and arranges client meetings to meet client deadlines.
- Identifies client expectations and ensures work meets or exceeds those expectations.
- Identifies client needs, anticipates and takes initiative in addressing issues and focuses on satisfying client needs.
- Identifies areas where additional services and/or implementation of new approaches will improve client profitability and success. Communicates this to the principal or partner assigned to client.

## Employee Service

- Accepts responsibility for leading junior staff members and supervisors working with you on assigned engagements.
- Mentors, assists, and motivates staff members to excel technically and professionally.
- Coaches, trains and provides assistance to junior staff.
- Provides expectations for performance, instructions, and direction.
- Maintains positive constructive relationships with all other levels of staff.
- Effectively and appropriately delegates work as needed.
- Provides constructive performance feedback and advice to junior staff and/or supervisors on submitted file work that they have prepared or reviewed on a timely basis.
- Participates in the recruitment process and development of staff members.
- Participates in the assessment of staff performance.
- Resolves concerns and conflicts, encourages suggestions and participation.
- Functions as an information conduit between client, partners, and staff members.
- Functions as a role model for staff members.
- Mentors and provides support to CPA articling students and CFE writers.

## Professional

- Reporting to the assigned Partner, directs and controls engagements and ensures:
  - engagements are planned, scheduled, staffed and finalized,
  - the quality and quantity of work meets all Firm and Professional standards,
  - budgets and engagement deadlines are met on a timely basis,
  - engagements are fully completed with all issues resolved,
  - issues are identified and creative solutions are recommended to the Partner on complex issues.
- Participates (with the Partner) in the presentation of financial statements, identification and discussion of issues with client.
- Supports staff members in the completion of the work including providing technical expertise as needed.
- Presents self in professional manner with all clients, staff including superiors, peers and subordinates at all times.

## Development

- Participates in professional development courses and training programs with a focus on developing management skills.
- Collaborates with the Partners to identify and develop an area of technical expertise.
- Develops and maintains a broad knowledge of financial management, specific industries, and the business environments.
- Develops and maintains accounting knowledge by reading policies, regulations, procedures, statutes and manuals including accounting and assurance standards, Income Tax Act, Rules of Professional Conduct, Code of Ethics, Quality Control Materials, Firm Policies & Procedures, and all other applicable materials.
- Participates in development and education in areas that enhance the Firm's ability to deliver service.
- Coordinates, facilitates and provides staff member training and development.
- Seeks feedback on performance.

## Firm Management

- Organizes engagements to achieve needed results, anticipates obstacles, and takes steps necessary to avoid them.
- Effectively uses and provides support and training for others in the use of software and technology tools.
- Participates in assigning staff to engagements to ensure engagements are staffed to maximize benefit to clients, Firm and staff members.

- Demonstrates professionalism through appearance and behaviour and functions as an ambassador for the Firm.
- Supports a positive image for the organization through positive interactions with clients, fellow staff and others.

## THE PERSON

### QUALIFICATIONS & EDUCATION REQUIREMENTS

The ideal candidate will have a CPA designation and have a minimum of five years post-designation experience working in a public practice environment. They will also have extensive experience working on a variety of accounting files, ranging in size and scope and be comfortable working with a wide range of client groups. The incumbent will have a demonstrated track record of success providing solid management, guidance and training to staff.

### KNOWLEDGE, SKILLS & ATTRIBUTES

**Solid Technical Accounting Skills** - Stays current with industry trends by continually seeking professional development opportunities. Is sought out by peers and junior staff for their technical expertise. Has a demonstrated reputation of being “ahead of the curve” in the accounting profession.

**Communication Skills** - Strong presentation skills, an active listener, well-proven written skills and a clear and concise report writing style. Experienced in product presentation.

**Self-Confidence** - Confidence in one’s skills and abilities, able to make difficult decisions and to stand by them and demonstrate a positive attitude, often in the face of strong opposition and/or criticism.

**Interpersonal Skills** - Able to work with people from a wide variety of industry sectors and organizations. Can adapt and be flexible to different environments as required.

**Strength of Character** - Ability to handle stress and stand up for one’s convictions with solid factual back-up information.

**Pragmatic Decision Maker** – Recognizes priorities and changing approaches and shows common sense and intuitive judgment abilities. Recognition of broader implications of identified risks.

**Professional** - Has a high degree of integrity both personal and professional; is honest, sincere, dependable, trustworthy and ethical.

**Leadership** - Achieves desired organizational results by encouraging and supporting the contribution of others; a proactive and positive team player who acts with a sense of urgency and leads by example; sets and communicates clear goals.

**Accountable** – Holds self and others accountable for responsibilities; focuses on results and measuring attainment of outcomes in a business focus.

**Strategic** – Develops and implements a plan in support of organizational strategic direction. Demonstrates an understanding of the link between one’s job responsibilities and overall organizational goals and needs and performs one’s job with the broader goals in mind.

**Communication** – Clearly presents written and verbal information; writes with clarity and purpose; communicates effectively in both positive and negative circumstances; listens well.

**Creativity and Innovation** – Develops new insights into situations; questions conventional approaches; encourages new ideas and innovations; designs and implements new or cutting-edge programs/processes.

**Effective Working Relationships** – Treats staff, colleagues, and customers with respect; resolves conflict respectfully and in a timely manner, negotiates effectively, and provides effective feedback to colleagues/employees.

**Integrity and Honesty** – Demonstrates a resolute commitment to and respect for the spirit and intent behind the rules and core values of the organization, setting an example of professionalism and ethical propriety.

**Client Focused** – Anticipates, responds, and attends to the needs of clients and other internal and external stakeholders. Keeps the client's interests in the forefront.

## **COMPENSATION**

A competitive compensation package will be provided including an attractive base salary and excellent benefits. Further details will be discussed in a personal interview.

## **FOR INFORMATION PLEASE CONTACT**

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