



## **OPPORTUNITY PROFILE**

### **Manager, Audit & Assurance**

## THE ORGANIZATION - KBH CHARTERED PROFESSIONAL ACCOUNTANTS

KBH Chartered Professional Accountants is an Edmonton-based public accounting firm established in 1981 and serves a broad range of businesses, charities and non-profit organizations in Alberta, British Columbia, Saskatchewan and Ontario. We have grown from three founders to a firm of 12 partners, and over 50 staff.

KBH is a Pre-Approved Program Route (PPR) provider through CPA Alberta.

Our main office is located in South Edmonton, with an additional satellite office nearby, and a second location in Provost, Alberta.

**KBH Core Purpose** – Helping people succeed

**KBH Core Values** – Service, Relationships, Integrity, Efficiency and Innovation

At KBH, our core purpose is Helping People Succeed. This is a philosophy that the firm tries to live by. At KBH, people are defined as our employees, our clients (owners, management, staff and others) and the community at large. The success of all three of these groups is important to us.

Employees - Success for our employees can take on many forms. Completion of specific training programs and exams is only one facet of success. As our employees grow and develop, they are given more challenging assignments. Handling new challenges is just another form of their success. We aim to do everything we can to assist our staff to become more successful.

Clients - Client success is typically measured in dollars but at KBH, success is much more than that. Success can mean meeting certain filing deadlines or making a better-informed decision because of the added insight our firm can provide. As advisors, success will mean the completion of an assignment whether that is assurance, financial, taxation, business valuation or management advisory services. KBH will also provide assistance with a transition plan and guidance throughout your experience with us.

Community - We have recognized that KBH is much more than just an accounting firm. We are a member of a thriving community and need to be active participants. Our participation in the community takes on many forms. KBH partners and employees are members of boards of directors for various organizations by participating in ongoing charity fundraisers and providing services. We understand that a successful community will provide benefits for all.

For more information visit [www.kbh.ca](http://www.kbh.ca)

## THE OPPORTUNITY – MANAGER, AUDIT & ASSURANCE

Reporting to the Partner group, the Manager, Audit & Assurance is responsible for managing a number of different engagements of various types, sizes and complexity, including Compilation engagements, Review and Audit Engagements.

The Manager, Audit & Assurance will provide guidance, support leadership to the associates, and plays a role in their professional development. They are responsible for assisting in the transition of the new file preparer taking files that were previously prepared by other staff, ensuring that the Manager's time will be dedicated to file review and continual staff development, and less file preparation.

The Manager, Audit & Assurance will advise partners on the progress of engagements while managing client communications. Responsibility for decisions being made with respect to file work starts with the Manager and is finalized by seeking advice from the Partner on the file.

Problems addressed range from simple to multi-dimensional and complex. The potential for conflict and risk ranges from low to high. Sound judgment, creativity, flexibility, and the ability to develop rapport and influence others are a big part of this role.

Decision-making in this role is based on firm and professional policies, procedures and standards. This includes adequacy of the quality and quantity of work on engagements, the methodologies to be used and appropriate solutions to complex issues.

## KEY ROLES & RESPONSIBILITIES

### Technical Skills

- Plans high-risk review and audit engagements.
- Prepares higher-risk compilation and review engagement files and/or completion of high-risk areas of review and audit files.
- Prepares higher-risk personal and corporate tax returns, various special purpose financial statements, forecasts and other special reports.
- Performs detailed reviews of lower-risk compilation and review engagements, audits and sections of audit engagements prepared by junior staff members.
- Ensures draft financial statements require no further change.
- Applies accounting principles and auditing procedures to ensure client files are properly prepared.
- Identifies issues and implements solutions in consultation with Partner (as required).
- Researches and interprets accounting and auditing standards.
- Resolves open items and issues on the engagement.

### Client Service

- Develops knowledge of the clients, the clients' businesses and the overall business environment.
- Develops positive working relationships with clients, including staff and management.
- In conjunction with the Partner, participates in pre- and post-engagement discussions on the work and how to improve service to the client.
- Establishes the time budgets on the files and monitors progress and workloads to meet deadlines and budget.
- Schedules onsite work to meet client deadlines, which is key to setting up file preparers for success.
- Identifies and makes suggestions to improve clients' business success.
- Clear presentation of ideas to a variety of audiences, in varying situations requiring significant oral and written communication skills.

### Employee Service

- Leads and functions as a role model for staff and is responsible for the engagements assigned to them.
- Coaches and trains staff by assisting and motivating them to excel technically and professionally. This is achieved through ongoing communication and the completion of job-by-job evaluations in a timely manner.
- Builds relationships with the staff and provides expectations for performance, gives instructions and direction while offering positive and constructive feedback in a respectful and professional manner throughout file preparation and upon completion.
- Delegates work efficiently, effectively and appropriately through the use of the firm schedule.

- Participates in the recruitment process and development of staff.
- Resolves concerns and conflicts by listening, offering suggestions, encouragement and advice.
- Functions as an information conduit between clients, partners, and staff.
- Mentors and provides support to Articling Students and CFE writers through the CPA Alberta program. This includes reviewing the semi-annual PERT reports and performing semi-annual reviews for assigned mentees.

## Professionalism & Firm Management

- Schedules staff according to budgets and deadlines and prepares work plans in advance of the start of engagements.
- Prepares status reports, monitors progress and identifies potential problems in client engagements when necessary.
- Reviews WIP, evaluates and explains budget variances and makes recommendations for improvements.
- Participates in post-engagement discussions and prepares points for future work.
- Manages assigned client responsibilities and workload.
- Complies with and supports Firm and Profession policies, procedures and standards, as well as provides training in Firm management processes and systems.
- Uses various software and technology tools and provides training to the staff.
- Reporting to the assigned Partner, the Manager directs and controls engagements, including ensuring:
  - 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
  - issues are identified and creative solutions are recommended to the Partner on complex issues
  - engagements are fully completed with all issues resolved
- Presents self in a professional manner with all clients and all levels of KBH staff.
- Demonstrates professionalism and functions as an ambassador for the Firm.
- Supports a positive image for KBH through positive interactions with clients, fellow staff and others.

## Leadership & Development

- Participates in professional development courses and training programs, with a focus on developing managerial and leadership skills.
- Develops and maintains a broad knowledge of financial management, specific industries, and business environments.
- Collaborates with the Partners to identify and develop an area of technical expertise.
- Develops and maintains accounting/auditing knowledge by reading policies, regulations, procedures, statutes and manuals including, but not limited to, 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.
- Prepares and makes technical presentations to staff members (i.e., more difficult topics for learn at lunches).
- Seeks feedback on growth and performance from the Partners.

- Takes part in the year-end meetings whenever deemed appropriate to continue to develop their skill set.

## Business Development

- Positively promotes the firm image, reputation, and culture.
- Successfully contributes to increased services to current clients. Takes the initiative to expand general and industry-specific business advisory skills and applies these to client situations with positive results.
- Develops strong, positive relationships with key personnel within the client base.
- Participates in industry, civic and social activities to build a network. The focus should be on building the network with little to no expectation of generating new business.

## THE PERSON

### QUALIFICATIONS & EDUCATION REQUIREMENTS

- Post-secondary degree
- Chartered Professional Accountant (CPA) designation
- 3 years of progressive experience post designation
- 5 to 7 years of experience in Public Practice
- Excellent managerial skills with the ability to assist staff in growing in their career development
- Continues to develop leadership skills while maintaining and enhancing managerial skills
- Maintains and grows technical expertise within the firm
- Enhances experience in training staff on a one-on-one basis or in a classroom setting on technical-related work.

### KNOWLEDGE, SKILLS & ATTRIBUTES

**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.

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

**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.

**Self-Confidence** - Confidence in one’s skills and abilities; ability to make difficult decisions and to stand by them and demonstrate a positive attitude in the face of opposition.

**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.

**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 broader goals in mind.

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

**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.

## 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.

## TO APPLY

For more details or to further explore this important strategic leadership opportunity, please contact:

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To apply, please submit a Cover Letter and Resume directly to [edmonton@leadersinternational.com](mailto:edmonton@leadersinternational.com) outlining your interest, qualifications and experience.