



OPPORTUNITY PROFILE

Senior Manager, Audit and 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 13 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

THE OPPORTUNITY – SENIOR MANAGER, AUDIT & ASSURANCE

Reporting to the Partner group, the Senior Manager is responsible for the ongoing management of a number of engagements and is involved in firm management through specialty leadership projects. The Senior Manager enables Partners to be more effective in their roles, by assuming additional technical responsibilities wherever possible. Growth within the role may see the Senior Manager responsible for billings and/or signing off on engagements for a small book of business.

The Senior Manager will provide guidance, support and leadership to staff and plays a crucial 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, and ensuring that the Senior Manager's time will be dedicated to file review and continual staff development.

Influencing others is a major component of the role. This role requires clear presentation of ideas to Partners, staff and clients, through exceptional oral and written communication skills. The Senior Manager position

requires sensitivity, flexibility and the ability to develop and maintain rapport with internal and external clients.

Problems are multi-dimensional, complex, and require depth and breadth of knowledge. Exceptional technical skills, sound judgment, flexibility and the ability to develop rapport and influence others internally are required.

Decision-making 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. The Senior Manager will advise partners on the progress of engagements while managing client communications. Responsibility for decisions being made with respect to file work rests primarily with the Senior Manager, while the Partner plays an advisory role.

Key Roles & Responsibilities

Technical Skills

- Plans and oversees high-risk review and audit engagements.
- Prepares complex financial statements, special reports, client correspondence, and proposals while forecasting and providing discussions on technical issues, advice and recommendations to clients.
- Performs detailed reviews of moderate to high-risk compilation, review and audit engagements.
- Ensures draft financial statements require no further change.
- Completes second reviews on assurance engagements as assigned.
- 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

- Maintains knowledge of clients, clients' businesses and the overall business environment.
- Maintains a positive working relationship with all clients, including staff and management.
- Functions as the primary contact on engagements.
- Leads pre- and 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. This is key to setting up file preparers for success.
- 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 and communicates this to the Partner assigned to the client.
- Assumes responsibility for the ongoing management of a group of clients and develops a client base.
- Adheres to internal and external professional standards and firm policies and procedures.
- Provides tangible positive results for clients through proactive and quality service.

- Introduces ideas and delivers high-value services that lead to significant noncompliance-related revenue increases to key and core clients.

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 performance expectations, 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 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 mentees.

Professionalism & Firm Management

- Organizes engagements to achieve needed results, anticipates obstacles, and takes steps necessary to avoid them.
- Participates in assigning staff to engagements to ensure engagements are staffed to maximize the benefit to clients and the Firm.
- Supports staff members in the completion of the work including providing technical expertise as needed.
- Reporting to the assigned Partner, the Senior 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
- Participates with the Partner in the presentation of financial statements, as well as the identification and discussion of issues with the client.
- Presents self in a professional manner with all clients and all levels of KBH.
- Demonstrates professionalism and functions as an ambassador for the Firm.
- Supports a positive image for KBH through positive interactions with clients, staff and others.

Leadership & Development

- Participates in professional development courses and training programs with a focus on developing managerial and leadership skills.
- Participates in and is responsible for developing in areas that enhance the Firm's ability to deliver services.
- Collaborates with the Partners to identify and develop an area of technical expertise. Seeks feedback on that development and performance while taking on a leadership role in that specific area of firm management.
- Provides support to one or more Partners while continuing to develop in a specific area of the firm.
- Develops and maintains a broad knowledge of financial management, specific industries, and business environments.
- 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.
- Coordinates, facilitates and provides staff training and development.
- Supervises effectively, recognizes capabilities of team members, and provides adequate on-the-job training.
- Provides timely, relevant and effective feedback to team members on a continuous basis and in performance evaluations.

Business Development

- Positively promotes 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 professional network. The focus should be on building the network with the expectation of generating new business.

THE PERSON

Qualifications & Education Requirements

- Chartered Professional Accountant (CPA) designation
- 5+ years of experience post-designation
- 8+ years of experience in Public Practice
- Exceptional managerial and leadership skills with the ability to assist staff in growing in their career development
- Continues to maintain and enhance leadership development skills
- Maintains and grows technical expertise within the firm

- Experienced 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

Leaders International values diversity, equity, and inclusion in all aspects of our operations. Candidates are invited to contact us directly with any accommodation requests.

To apply, please email your cover letter and resume (PDF or Word document only—preferably as one document) to **Ardyce Kouri** or **Olesia Linkevych** at apply@leadersinternational.com indicating the job title in the subject line.

Leaders International www.leadersinternational.com