

### Roles & Responsibilities

- ✦ Preparation of Financial Accounts and Income Tax Returns, for a range of entities , including:
  - ▶ Preparation of accounts to trial balance and ability to understand and identify Profit & Loss/Balance sheet tax sensitive items - i.e. Legal Costs, Repairs & Maintenance
  - ▶ Ability to prepare client query list based on identifications above for review by Client Manager
  - ▶ Understanding and ability to prepare tax reconciliations
  - ▶ Demonstrates proficient understanding of:
    - Hire Purchase/Chattel Mortgage arrangements, ability to prepare schedules from original hire purchase agreement documents and complete the necessary journal entries to record the transaction
    - Div 7A & UPE
    - SBE rules
    - Relevant disclosures that need to be made within tax returns (company, trust, individual, partnerships)
    - How Trusts work
    - Fringe Benefits Tax
    - Depreciation rules
  - ▶ Working knowledge of superannuation
  - ▶ Ability to prepare BAS Reconciliations using Proforma spreadsheet and understanding of all reporting obligations
  - ▶ Ability to navigate Tax Agent Portal
- ✦ Preparation of tax planning work and provision of recommendations
- ✦ Potential to manage fees within their team leaders client list
- ✦ Ability to review work and understand workflow, including:
  - ▶ Ability to self review work
  - ▶ Ability to review work performed by graduates / undergraduates
  - ▶ Ability to prioritise & use time effectively
  - ▶ Ability to meet deadlines
  - ▶ Communicates delays / issues with assignment to manager in advance of deadline
  - ▶ Understands and monitors budgets
- ✦ Awareness and interaction, including:
  - ▶ Responds positively and quickly to client's and team members requests.
  - ▶ Demonstrates excellent listening skills
  - ▶ Expresses opinions clearly and logically with excellent verbal and written communication
  - ▶ Ability to develop professional relationships with team members
  - ▶ Willingness to help others
  - ▶ Demonstrates initiative
  - ▶ Demonstrates high professional standards - Is honest and trustworthy
- ✦ Software skills, including:
  - ▶ APS: XPA & Tax Manager knowledge (preferred)
  - ▶ Xero, MYOB & QuickBooks knowledge (including ability to navigate programs and extract a variety of reports to enable reconciliation of accounts and assist with client queries)
  - ▶ Demonstrates intermediate to advanced ability to use Microsoft Office Products (Word, Excel, Email)

### Qualifications

- ✦ Bachelor of Business or Commerce (Accounting)
- ✦ Commenced CA/CPA (completion of Tax module preferred)

### Pre-requisites

- ✦ 1-3yrs Australian Public Practice experience