



**HORTY**

*Your Partner for Success*

**Job Title:** A&A Manager  
**Department:** A&A  
**Reports To:** Director(s)

**SUMMARY**

Manages multiple financial, tax or consulting projects by maintaining client relationships, supervising staff and gathering necessary information to provide a timely, quality product to clients. Responsible for scheduling, staffing and coordinating workflow. Develops and trains staff by performing the following duties.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following. Other duties may be assigned.

Responsible for all phases of an audit, compilation, or review engagement.

Maintains contact with clients throughout the year and possesses a thorough knowledge of the client and all facets of the client's business.

Plans, schedules and staff engagements using Firm policies and procedures.

Maintains familiarity with qualifications of all Team Members and reviews assignments.

Prepares engagement letters for approval by Director.

Evaluates internal controls and work programs prepared by Team Members.

Adheres to engagement time budgets.

Supervises and provides on-the-job training to Team Members.

Prepares and reviews workpapers and reports.

Anticipates problem areas of engagements and questions that will arise.

Informs Director of all important developments on engagement, analyzes problems and recommends solutions.

Ensures that financial statements, tax returns, and letters of recommendations are prepared in accordance with professional and Firm standards.

Communicates progress of engagements, problems and resolutions to client.

Assists in performance evaluations of other Team Members.

Prepares invoices to clients, communicates details of fees to clients, and assists in collection of overdue accounts.

Maintains a knowledge of general economic and political trends of possible tax or other legislation that could affect the business climate.

Advises the Director responsible for an engagement potential for additional services.

Maintains good relations within the community.

Markets the Firm by attending functions and events that promotes the Firm with clients, potential clients and peers.

### **SUPERVISORY RESPONSIBILITIES**

Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities include interviewing and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

**QUALIFICATIONS** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **EDUCATION and/or EXPERIENCE**

Bachelor's degree (B.S.) or Master's degree (M.A.) or equivalent; or four to ten years related experience and/or training; or equivalent combination of education and experience. Minimum of forty hours of continuing professional education is required each year to develop technical and supervisory skills to provide and supervise services to clients.

### **LANGUAGE SKILLS**

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business

correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

**MATHEMATICAL SKILLS**

Ability to apply advanced mathematical concepts such as simple equations, probability and some statistics.

**REASONING ABILITY**

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

## **CERTIFICATES, LICENSES, REGISTRATIONS**

C.P.A.

Valid driver's license

**PHYSICAL DEMANDS** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, frequent same-day travel for work at a client's office, meetings and seminars using a personal vehicle. In addition, the employee is frequently required to stand; walk; sit; use hands to finger, handle, or feel; reach with hands and arms; and talk or hear. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

Occasional overtime is required throughout the year. Heavy overtime work is required from February 1 through April 15, which may be in excess of 55 hours per week.

**WORK ENVIRONMENT** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The working environment changes with the client and the professional services provided for that client. A significant percentage of time will be spent indoors in an office atmosphere. Occasionally client work could be outside, in a warehouse, on factory floors, etc., if necessary.

## **OUTSIDE CONTACTS**

Examples: Client personnel, government agency officials, and bankers.

Typical nature: Resolving issues, researching transaction discrepancies and follow-up on client satisfaction.