



Audit Manager Role Profile

Summary

Provides audit and consulting services to clients

Key Responsibilities:

1. Perform audits, reviews and full disclosure compilations for clients in a variety of for-profit industries including construction, manufacturing, distribution and healthcare.
2. Ensures all aspects of the engagement are completed from the planning process through the review of the financial statement.
3. Manage client relationship for assigned group of clients including managing expectations and meeting deliverable deadlines.
4. Involved in the planning and preparation of tax returns for businesses, individuals and fiduciaries
5. Work as part of a team that helps to provide industry knowledge and experience to clients.
6. Develop, motivate and train staff, senior and supervisor level team members.
7. Collaborate with partners on both team and client issues.

Education/Experience Required:

Minimum of 5 years experience required. Public accounting manager or supervisor experience with inventory-based accounting preferred. CPA required.

Core Competencies/Skills Required:

- *Results Orientation* – Focuses the effort and energy of the audit team on the most critical activities/issues of a project. Ensure key decision makers coordinate activities, share information and effectively manage resources throughout the project. Takes action to achieve challenging goals.
- *Change Orientation* – Able to develop contingency plans to ensure projects are completed on time and within budget. Develops clear, understandable goals/priorities and persuasively communicates them to others. Responds to changing situations by being innovative, creative and taking action to ensure needs are met.
- *Communication* – Openly discusses real or potential problems with clients, project team members or a partner, taking careful measure to understand what is being said. Effectively articulates both the big picture and the details. Keeps others informed as necessary.
- *Developing Self and Others* – Generously shares knowledge with others to facilitate skill development and career advancement. Open to new ideas and learning new things. Actively participates in/facilitates CPE. Able to receive constructive criticism and demonstrate learning from previous experience.
- *Initiative* – Challenges conventional thinking within the firm and client organizations. Identifies and implements ideas for continuous improvement for the firm and its clients. Initiates individual or group projects, taking complete responsibility for the project.
- *Relationship Building* – Works to build, maintain and utilize individual relationships or networks with co-workers, clients, and other people who are, or might be, helpful in achieving work related goals. Professional relationships are based on mutual trust and respect.

- *Conceptual Thinking* – Identifies meaningful trends or patterns in interactions or technical data that suggest possible problems or solutions. Evaluates the costs, benefits and risks of alternative solutions.
- *Influence* – Actively seeks, discusses and listens to information and ideas from others. Presents persuasive arguments with personal presence and professional credibility, convincing others to change the course of events. Able to identify key decision makers.
- *Strategic Thinking* – Uses understanding of the firm and its clients, positions in their respective markets, and business trends to envision, support, create and execute organizational strategies.
- *Teamwork* – Takes a leadership role in teambuilding and monitoring progress including identifying individual roles and understanding group dynamics. Identifies and removes organizational barriers to assist the team. Encourages team members to express ideas and considers them with an open mind. Promotes looking at firm goals in addition to team goals.
- *Technical Excellence* – Responsible for all technical issue identification on projects and participates in issue resolution utilizing all available resources. Able to break down, discuss, present complex technical issues in a simple, meaningful and focused manner.

Demonstrated Contributions/Results:

Client Services

- Consistent track record of success in serving clients with demonstration of high quality client service.
- Creates, establishes, manages, and meets or exceeds clients' expectations.
- Consistent track record of meeting deadlines
- Regularly obtains positive feedback from clients on satisfaction of work.
- Past successful results in research and technical judgment.

People Development

- Supervises effectively, recognizes capabilities of subordinates, and provides effective on the job training.
- Supports the PACE process and proactively ensures all areas are completed.
- Provides timely, relevant, and effective feedback to staff on a continuous basis, and, when asked, in an annual review of a co-worker's performance.
- Assists in identifying and filling recruiting needs for the firm, taking a leadership role on recruiting specific candidates based on business needs.

Firm Economics

- Looks for ways to control efficiency and works with others to develop cost containment measures.
- Past successful results in achieving and maintaining appropriate productivity based on responsibility.
- Achieves, on a consistent basis, realization targets established by the engagement budget.

Business Development

- Develops relationships with appropriate referral sources and follows up with contacts to develop client prospects or new work.
- Achieves visibility in general business community.

Desired Values/Culture:

- Professionalism
- Dedication
- Respect
- Excellence
- Integrity
- Teamwork

Authority/Responsibility:

- Reports to the _____ Partner of Soren McAdam Christenson LLP
- Direct reports may include Staff, Senior and Supervisor level audit team members.
- Responsible to provide regular feedback including performance reviews of staff.

Other Preferences:

- Must possess excellent computer skills including proficiency in Microsoft Office.
- Must possess a strong willingness to participate in a high-energy team environment.
- Experience with paperless software a plus.

Every firm member who works for Soren McAdam Christenson LLP works not only for a particular team/partner, but also for the firm as a whole. Accordingly, firm members are expected to act in the best interests of the firm, even if doing so requires actions and behaviors not listed in the above Role Description. This Role Description is provided as a tool to assist you in understanding your position and is subject to revision by management when client service needs change