



Job Title: Assurance Senior Associate

Department: Assurance

Reports to: Assurance Manager/Senior Manager/Principal

Level: Exempt

Last updated: April 2020

Summary of Responsibilities:

The Assurance Senior Associate is responsible for seeing smaller engagements through from start to finish and may manage two or more engagements simultaneously. Senior Associates will assume responsibility for larger engagements and special assignments, perform fieldwork, review work papers and develop audit materials as required. The ideal candidate will be able to communicate with pronouncements of professional and other regulatory groups. This is a dynamic role with high expectations.

Essential Functions:

- Possesses strong technical skills, maintains high attention to detail, provides for a high quality work product, and ensures application of professional and firm standards
- Meets time constraints and client deadlines
- Provides supervision and on-the-job training to team members assigned to engagement
- Supports training of team members, offers guidance and direction, gives constructive criticism of work papers
- Develops Assurance/attest work plan, budget, and staffing
- Develops first draft of engagement letters and PBC lists; works with client on timing of engagement
- Follow all professional standards, GAAP, GAAS, ethics, etc
- Proposes scope of testing required in an Assurance and selects the transactions to be tested
- Prepares routine correspondence to client for approval and signature of a manager or partner; prepares draft management letters
- Drafts reports including footnotes, rep letters, and other required schedules, reports, etc.
- Performs the broadest range of necessary tasks so that direct participation of supervisors, managers or partners is kept to a minimum
- Performs other accounting and assurance duties as needed on engagements and as assigned by management personnel
- Supervises/develops/coaches team members as assigned
- Sets individual goals that support departmental and firm goals
- Perform other duties as assigned



Education, Experience, and Skills:

- Bachelor's degree in accounting from an accredited college or university
- Audit experience with intermediate IT skills preferred
- A minimum of 2-4 years of experience in the Assurance area of public accounting
- Intermediate knowledge of Microsoft products, information systems architecture, information security and risk processes
- Complete assigned CPE or professional development courses as required annually
- CPA certification or in process

Expectations:

- Respect and earn the respect of fellow team members
- Take ownership of identified processes and responsibilities
- Keep open communications with manager, team and leadership
- Perform work with confidence and pride, follow through to completion
- Dependable
- Make informed decisions – discuss with manager when needed
- Grow and learn from past mistakes
- Work in a safe, clean and employee friendly atmosphere
- Work personal/professional development plan
- Must have flexibility with work schedule
- Follow Independence requirements
- Follow Firm policies and procedures

Working Conditions:

- Minimal hazards
- General office working conditions
- Overnight and daily travel to and from client locations required
- Periodic evening and/or weekend work
- Travel as needed

By signing below I acknowledge I have read and reviewed this job description and understand my job responsibilities:



Employee Signature and Date

We are committed to providing equal employment opportunities to all employees and applicants without regard to race, ethnicity, religion, color, sex (including childbirth, breast feeding and related medical conditions), gender, gender identity or expression, sexual orientation, national origin, ancestry, citizenship status, uniform service member and veteran status, marital status, pregnancy, age, protected medical condition, genetic information, disability or any other protected status in accordance with all applicable federal, state and local laws.

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