



**Job Title:** Accounting Services Senior Associate

**Department:** Accounting Services

**Reports to:** AS Team Leader

**Level:** Non-Exempt

**Location:** Jeffersonville

**Last updated:** 11.2021

### **Summary of Responsibilities:**

- Intermediate skill level on accounting software
- To be accountable for client due dates on financial statements and payroll taxes
- To assist with special projects as needed
- Coordinate with CPAs on year end schedule preparation and timing, as requested
- Coordinate with the Director of Operations, Accounting Services Manager and/or Supervisor regarding any client service issues, as appropriate
- Maintain workload that provides an average of 80% productivity
- Strive to maintain a realization rate of no less than 90%

### **Essential Functions:**

- Prepare appropriate schedules and reports as requested (including workpapers)
- Prepare monthly or quarterly financial statements and compilation reports for assigned clients accurately and timely
- Accountable for payroll deadlines for assigned/supervised clients
- Review accounts payable
- Review accounts receivable
- Communicate with clients regarding financial statement issues
- Troubleshoot and research notices from taxing authorities related to assigned clients payrolls
- Travel to and work at client locations
- Maintain open communication with the MCM team with confidence by addressing client issues openly, honestly and promptly
- Other duties as assigned

### **Education, Experience, and Skills:**

- High School diploma required. Actively pursuing an undergraduate degree in accounting preferred.
- Experience with accounting software (e.g. Quickbooks, Peachtree, Intacct, etc.)
- Proficient with Microsoft Word and Excel



**Expectations:**

- Respect and earn the respect of fellow team members.
- Take ownership of identified processes and responsibilities.
- Keep open communications with manager and partners.
- 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.

**Working Conditions:**

- Minimal hazards. General office working conditions.
- Occasional heavy lifting.
- Periodic evening and/or weekend work.

We are committed to providing equal employment opportunities to all employees and applicants without regard to race, ethnicity, religion, color, sex (including childbirth, nursing 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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