



Job Title: Accounting Services Project Manager
Department: Accounting Services
Reports to: AS Team Leader
Level: Full time, Exempt
Location: Jeffersonville/Louisville/Cincinnati/Indianapolis
Last updated: 11.2021

Summary of Responsibilities:

The Accounting Services Project Manager will be charged with performing various functions related to client service and/ or client relationship management, special project management and on-going recurring client accounting and reporting management or controllership services. They will be expected to function independently of significant management oversight on a variety of projects and be able to use a variety of software products. They will receive project assignments from the Director or Accounting Services or other MCM Partners determined based on the best client service model for the client. The Director will monitor and ensure that the assigned client work load is appropriate and provide resource support from the AS group if needed. The AS Project Manager may need to assist with review of other client work or projects but not on a recurring basis. Responsibilities will include ability to prioritize workload, meet predetermined deadlines and assist with special projects as needed. All tasks will align with the tax and assurance teams defining objectives and may change as deemed necessary and appropriate.

Essential Functions:

- Skilled and experienced in determining scope and approach for various accounting and reporting engagements
- Thorough knowledge of efficient and effective financial statement reporting with the ability to suggest and prepare all standard financial statements as well as analytical reports including Key Performance Indicators and other dashboard reporting
- Proficient working knowledge of financial statements and general ledger accounting to include review and reconciliation of client books and records
- Proficient working knowledge to setup a new set of accounting records within various software offerings (QuickBooks, Peachtree, Intacct, etc.)
- Ability to prepare required work papers to be used in tax return preparation or assurance work papers
- Proficient working knowledge of payroll, payroll taxes and recording of related adjusting entries in a general ledger including the ability to advise clients on proper setup with their software or ability to review third party reports for errors



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- Technological expertise to access and work with client automated accounting records
- Ability to review a general ledger for proper accounting or coding
- Ability to determine appropriate debit and credit adjusting journal entries necessary to reconcile accounts and ensure accuracy of balances
- Ability to prepare appropriate schedules and reports in excel or word as requested (including maintaining documented workpapers)
- Excellent client communication skills that foster client confidence in the work product and the relationship
- Ability to manage multiple tasks, prioritize, and meet deadlines
- Ability to manage scope of engagement within budgeted constraints or discuss and obtain approval of appropriate change orders
- Able to travel to client locations, as required by client demands
- Skilled at maintaining open and honest communication with the appropriate MCM team regarding status of client assignments
- Ability to perform billing responsibilities on a timely and consistent basis for assigned projects
- Additional responsibilities assigned as necessary

Education, Experience, and Skills:

- High School diploma required.
- Accounting degree or equivalent work experience of accounting services supervisor or manager preferred
- Experience with accounting software (e.g. QuickBooks, Peachtree, Intacct, etc.)-Intermediate or advanced skill level preferred
- Proficient with Microsoft Word and Excel
- Certified QuickBooks ProAdvisor or willingness to work toward other certifications

Expectations:

- Respect and earn the respect of fellow team members.
- Take ownership of identified processes and responsibilities.
- Keep open communications with Director, Partners, other managers, 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.



Working Conditions:

- Minimal hazards.
- General office working conditions.
- Periodic travel to client locations.
- Periodic evening and/or weekend work based upon work load allocation.

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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