

position profile.

Team	Business advisory and tax.
Position	Senior Accountant SMSF and Taxation
Reports to	Manager and Director
Employment status	Full time
Working days	Monday to Friday
Hours	8:30am - 5:00pm
Current as at	20 November 2017

It is not the intention of the position description to limit the scope or accountabilities of the position but to highlight the most important aspects of the position. The aspects mentioned below may be altered in accordance with the changing requirements of the role.

Position objective

Working as part of a close knit team, this role is involved in the planning and preparation of annual financial statements and income tax returns for a diverse range of self-managed superannuation funds along with general tax compliance work for private and business clients.

Under the direction of the Managers and Directors the scope of the role will include but not be limited to the following:

Key responsibilities

- **Technical SMSF and Tax Compliance**
 - Assisting with the annual compliance and audit for a large number of self-managed superannuation funds, including the preparation of financial reports, income tax returns and maintenance of the audit file
 - A sound understanding of the SIS Act and relevant superannuation concepts, including but not limited to;
 - o contributions
 - o pensions
 - o conditions of release
 - o commutations
 - o LRBAs
 - o taxable/tax free components
 - o the \$1.6m cap and TBAR compliance

- Timely and accurate identification of tax compliance issues
- Ensuring files are completed and kept up to date
- Preparation of pension documents and calculations thereof
- Preparation of quarterly activity statements for various SMSFs and potentially business clients
- Current knowledge and experience of various entity structures and the tax implications of each
- Preparation of financial accounts and tax returns for individuals, partnerships, trusts and companies as required
- Undertake research on Tax and related issues for internal use
- Prepare comprehensive working papers consistent with Bartons standard operating procedures
- A sound understanding of the application of GST and CGT
- A sound understanding of state taxes
- **Quality, Productivity and planning**
 - Proactively identify and communicate job status and emerging issues
 - Continuously apply a high level of self-review to work
 - Independently manage work flow and productivity
 - Meet agreed targets for all tasks and productivity budgets
 - Maintain all WIP under your control
- **KPI's and Client service**
 - Meet all productivity and job budgets along with service targets consistently
 - Use time effectively and efficiently
 - Provide a high level of service to all Bartons' clients, responding quickly and positively at all times
 - Uphold Bartons' professional level of commitment to all new and existing clients
- **Innovation**
 - Generate creative solutions to work-related issues
- **Learning, professional development**
 - Regularly undertakes any learning and professional development deemed beneficial for this role
 - Provide learning to other staff as may be required from time-to-time
- **Information technology**
 - Advanced user of BGL SMSF software
 - Experience in the use of the following:
 - MYOB, Xero, Quickbooks, APS and Microsoft Office
 - Utilise computer-based knowledge in the most cost effective and time efficient manner.

- Seek to continually improve upon current knowledge and skill base, for all relevant hardware, software and information management systems.
- Ensure the software used for the fulfilment of your duties is up-to-date

Experience & qualifications

- Tertiary qualified in accounting and currently studying or considering studying towards the completion of CA/CPA
- Maintain CPD requirements of membership body
- Minimum 3 years' experience within public practice
- Excellent working knowledge of the Australian Accounting & Auditing Standards, legislative and regulatory requirements

Personal qualities and integrity

- Proactively identify and manage risk and in communicating job status and emerging issues
- Continuously apply a high level of self-review to work
- Produce work to a high quality and professional standard
- Demonstrate a very high level of professional standards
- Honest, ethical and trustworthy
- Able to accept responsibility and to own the role
- Proactive and solutions driven
- Comfortable in reaching out for help and assistance when required
- Follow and uphold firm procedures
- Demonstrate a high level of initiative
- Build and maintain a professional working relationship with all team members, managers and directors
- Demonstrate a team attitude and have the ability to work effectively in groups
- Proactively contribute to team meetings
- Build and maintain excellent interpersonal skills with fellow staff and clients
- Work consistently in a collegial and professional manner
- Express opinions and ideas clearly and confidently - both verbal and written
- Participate in firm wide community and philanthropic initiatives

Employee

Signed

Name

Date

Employer

Signed

Name

Title

Date