

## ACCOUNTING ADVISOR

*Wymer Brownlee values diversity of culture and thought and seeks talented, qualified employees in all its operations regardless of race, gender, national origin, religion, sexual orientation, disability, age or any other protected classification. We strive to create an inclusive environment and are proud to be an Equal Employment Opportunity Employer.*

<b>Reports To</b>	Tax Director	<b>Wage Range</b>	TA
<b>Date Approved</b>	3.17.2012	<b>Date Last Revised</b>	7.25.18
<b>Exemption</b>	Administrative		

### Job Summary

The person in this position is required to have a keen understanding of accounting principles and functions. This position works in close partnership with tax teams and requires effective and timely accounting work, payroll and reporting, and a keen understanding of QuickBooks. Maintaining the highest level of client satisfaction is a must.

At Wymer Brownlee Wealth Strategies we enjoy what we do and the people we do it with. We believe that what we do matters and is exemplified by the level of trust and customer services we deliver. We earn the trust and confidence of our team members, clients, their families and the communities in which we serve by upholding a personal value system based on honesty, integrity and gratitude. We support all policies, procedures, and programs which build and sustain our internal culture.

**Essential Functions and Accountabilities** include, but are not limited to

1. Collect, record and analyze financial information for individuals and businesses. Functions include but are not limited to; timely and accurately post journal entries, update financial statements, prepare monthly financial reports, calculate payroll taxes, auditing and maintaining accounts receivable and accounts payable.
2. Carry out financial data analysis and forecasting.
3. Manage and maintain positive client relationships; including service requests, scheduling meetings, assisting in completing paperwork and forms, and providing all information to the client. Respond to all phone calls and emails within 24 hours.
4. Prepare limited number of tax returns.
5. Build a demonstrated understanding of Wymer Brownlee products and services.
6. Build a confident, respectful relationship with tax and accounting teams.
7. Maintain professional and technical knowledge and adherence to any and all requirements as they pertain to payroll and accounting practices by attending CPE workshops, classes; renew professional publications as necessary.
8. Participate in team meetings; bring tax director up-to-date and identify any barriers in accomplishing tasks.
9. Adopt and assure the consistent use of repeatable processes to assure the firm maintains operational efficiencies.
10. Other accountabilities as required.

### Wymer Brownlee Core Values

1. Make it Matter
2. We, Not Me
3. Status Quo is Not Our MO

## **Supervisory Responsibilities**

This position has no supervisory responsibilities

## **Experience, Education and Licensure**

College degree in accounting or related field; a minimum of two years' experience in a multi-client setting; understanding of full general ledger, payroll tax reports, and debit/credit skills. Advanced QuickBooks knowledge. Experience in tax preparation is a plus. Fluency in UltraTax is desired but not required.

## **Competencies**

### Accountability/Initiative

Accepts personal responsibility for the quality and timeliness of work. Exhibits attention to detail; acknowledges and corrects mistakes. Makes no excuses or casts blame. Carries their fair share of the workload without waiting to be asked to take action. Follows up personally and monitors progress to ensure progressive movement of tasks. Can be counted on to complete commitments without being micromanaged.

### Attendance/Punctuality/Dependability

Comes to work on time every day. Is fully prepared and ready to work at beginning of work schedule and continues until work day is done. Makes appropriate arrangements when adverse weather or other problems might delay on-time arrival. Conforms to work hours and schedule. Lets supervisor and others know immediately when unexpected problems cause absence, lateness, or the need to leave early.

### Client Focus

Builds client relationships; is aware of their needs to meet or exceed expectations; provides a WOW! Experience. Gains client trust and respect. Actively seeks client feedback on quality of service provided. Does not take issues personally and is quick to resolve client concerns. Applies knowledge of products and services to meet client requirements.

### Communication Skills

Presents ideas clearly and effectively without offending others. Listens attentively and with objectivity; asks good questions. Communicates well verbally and in writing. Keeps supervisor and coworkers informed; ensures information and ideas are flowing in appropriate directions. Identify and communicate any obstacles in accomplishing tasks.

### Ethics and Integrity

Builds Trust. Respects and maintains confidentiality. Admits mistakes in spite of the potential for negative consequences. Defines and practices moral and ethical behavior at all times. Avoids situations and associations that could be considered inappropriate. Honest and transparent in all dealings. Upholds and models our core values; acts in such a way as to be the person others look up to.

### Job Knowledge and Continuous Improvement

Strives to be an expert in their job and serves as a resource to others to help solve problems and improve performance. Actively acquires new skills and input from others. Views constructive criticism and negative experiences as learning opportunities. Open to suggestions and new ideas. Maintain CPE.

### Managing Change

Adapts easily to changing conditions and work responsibilities. Supports the evolution of the firm and those around you. Able to acknowledge and work comfortably with people of differing styles, temperaments, and preferences. Bounces back quickly from setbacks and frustrations.

### Professional Presence

Dresses appropriately for the position and role. Presents a well-groomed, clean and neat appearance. Appearance does not call undue or inappropriate attention to self. Appearance represents organization well.

### Results Focused

Sets high goals and strives to achieve them. Seeks performance feedback and uses it to improve self. Stays on task in spite of distractions and interruptions. Demonstrates persistence; meets deadlines. Exhibits initiative. Has a strong sense of urgency about solving problems and getting the job done.

### Team Focus

Is aware of how their job affects coworkers and the morale and heartbeat of the team. Maintains an upbeat, positive attitude. Fulfills commitments to other team members. Puts team success ahead of individual success. Balances team and individual responsibilities. Does not monopolize credit for others work.

### **Work Environment**

The work environment characteristics described are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The work environment is typical of an indoor, office setting.

### **Physical Functions**

The physical demands described are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is frequently required to sit; talk; or hear. The employee is occasionally required to stand; walk; use hands to finger, handle, or feel; reach with hands and arms; and stoop; kneel; or crouch. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision and depth perception.