

JOB DESCRIPTION

JOB TITLE: Client Advisor

EMPLOYEE:

REPORTS TO: Operations manager

DATED: February 2019

POSITION SUMMARY

Responsible for the timely and accurate completion of financial statements and taxation returns and business advisory services.

Key Responsibilities	Tasks	KPI
Client service	<ul style="list-style-type: none"> ➤ Timely response to client queries and issues as requested by client owner. 	
Workflow management and job budgets	<ul style="list-style-type: none"> ➤ Preparation of financial statements ensuring all material queries are cleared before review. ➤ Preparation of taxation returns. ➤ Understand MDP's expectations in relation to workflow. ➤ Use tools and procedures available. ➤ Manage time budgets and turnaround time. ➤ Any other duties as may reasonably be required of you. 	<ul style="list-style-type: none"> ➤ Monthly job completed targets are met. ➤ Work has been completed within agreed timeframes. ➤ Work has been completed within agreed time budget.
Team leadership and development	<ul style="list-style-type: none"> ➤ Understanding of work delegated to you. ➤ Develop accounting knowledge & skills. ➤ Learn more difficult and complex jobs. ➤ Actively participate at coffee catch ups and internal training sessions. 	<ul style="list-style-type: none"> ➤ Meet minimum CPD hours per annum where required to meet CAANZ requirements.

Qualifications, Experience and Competencies	
Qualifications & Experience	<ul style="list-style-type: none"> ➤ At least 3years post graduate experience in the preparation of financial statements and tax returns for all entity types.
Core competencies	<ul style="list-style-type: none"> ➤ Analytical and problem solving skills ➤ Verbal, listening and writing skills ➤ Ability to learn ➤ Client interaction

	<ul style="list-style-type: none"> ➤ Internal communication ➤ Planning and organisation skills ➤ Developing technical competence ➤ Quality of working papers ➤ Timeliness, accuracy, responsibility, attention to detail ➤ Adherence to internal procedures
What MDP expects from you	<ul style="list-style-type: none"> ➤ Prepare financial accounts to level required without errors ➤ Jobs completed on time, within budget ➤ Able to manage workload, establish priorities ➤ Able to identify and address workflow issues ➤ Meet monthly budget and other firm KPI's ➤ Maintain high standard of work papers ➤ Communicate clearly and in a timely manner with clients and team members ➤ Proven experience with accounting and Microsoft office software.
What MDP wants from you	<ul style="list-style-type: none"> ➤ Proactive in managing your workload
Personal attributes	<ul style="list-style-type: none"> ➤ Able to work under pressure ➤ Ability to meet deadlines ➤ Flexibility ➤ Helping other team members when appropriate ➤ Excellent time management skills ➤ Excellent communication and interpersonal skills ➤ Being part of a team ➤ Work in a focused manner and with attention to detail ➤ Displays each of the following attributes – excellent work ethic/dedication/punctual/initiative/personality/pro-active/attention to detail/organised/professional
Demonstrate MDP core values	<ul style="list-style-type: none"> ➤ Vibrant – fun, energetic, passionate ➤ People focused – care for each other at work and at home ➤ Driven – by who we are, what we do and how we do it.

This job description is intended to form part of your employment agreement and replaces all previous job descriptions