

Job Description

JOB TITLE:	Associate
EMPLOYEE:	
REPORTS TO:	Head of Department
LOCATION:	Invercargill
DATED:	November 2022

ROLE SUMMARY:

This role is a critical link between McIntyre Dick and our clients. . It is a leadership role within our business and our associates are expected to actively model our firm values. It is responsible for:

- the flow and quality of client work;
- the strength of the relationship between McIntyre Dick and our clients;
- growing the depth and breadth of services provided to clients, evidenced by an increase in fees and referrals;
- fee growth through the introduction, successful onboarding and service uptake of new clients.

Key Accountability Areas	Expectations
1. Client Service & Experience	<ul style="list-style-type: none"> – Provide high quality and relevant solutions for clients that accurately meet their accounting, taxation, business advice and business development needs. – Ensure level of service delivered is consistent with client expectations. Identify, address and remediate challenges and roadblocks that impact on client service standards and timely delivery. – Build trusted relationships with clients through open, clear and respectful communication. – Build and maintain a strong professional network of referrers, including attendance at networking events and opportunities. – Engage with and promote awareness of McIntyre Dick’s business advisory and development services to clients and the public through attendance at networking events and opportunities. – Grow the number and value of quality business clients for McIntyre Dick.
2. Technical Service Delivery	<ul style="list-style-type: none"> – Provide general accounting, taxation and business advice to clients, including, but not limited to solutions on business structures, tax, business planning and succession. – Collaborate with the Head of Business Development to grow one to many and one to one business coaching. – Communicate expectations and job requirements clearly (scope of work, fees, turn around time). – Present and discuss financial statements with clients. – Timely and accurate completion of group and/or complex financial statements and tax returns. – Review work from compliance and support teams to ensure the provision of quality and timely service to our clients. Provide effective and timely feedback on quality and timeliness of work from the team. – Actively engage in and drive core workflow and job turnaround. Manage and monitor KPIs, budgets, client billing, taxation obligations and timely completion of workflow. Utilise and continuously enhance the tools and procedures to achieve this.

Key Accountability Areas	Expectations
3. Collaboration & Leadership	<ul style="list-style-type: none"> - Work collaboratively with other members of the team to support them and their areas of responsibility. - Be part of key business projects that grow the capability of the business, including but not limited workflow, IT solutions and processes, and continuous improvement. - Contribute beyond core role to enhance the overall effectiveness of our wider team and successfully achieve McIntyre Dick's plans. - Actively and positively role model core values and behaviours. - Contribute to McIntyre Dick's strategic and operational planning, particularly around business advisory and business development service offerings. - Undertake regular and ongoing professional development and personal improvement.
4. Health and Safety	<ul style="list-style-type: none"> - Effectively communicate and support a culture of safe and healthy work practices. - Support a positive, healthy and safe work environment that is consistent with the Health and Safety at Work Act 2015. This includes relevant training and upskilling. - Take reasonable care to look after personal health and safety, fitness for work, and the health and safety of others.

Person Specification	
<p>For success in this position the candidate will have the following knowledge, experience, skills and personal attributes:</p> <ul style="list-style-type: none"> - Skills, agility and experience required to manage the end-to-end accounting process in a dynamic environment. Capable of prioritising tasks/duties as assigned and delegating tasks as needed - An enquiring, continuous improvement and can-do mindset. - Thrive on developing effective relationships with clients, other professionals and colleagues. Strong interpersonal skills, with the ability to build relationships across departments, work collaboratively, and manage conflict constructively. - Highly developed interpersonal, written and oral communication and presentation skills. - Excellent organisational and time management skills, with the ability to remain agile, manage competing priorities and projects, effectively prioritise tasks and work well under pressure. - The ability to understand compliance and regulation legislation, policy and requirements, and be able to apply those within the organisation. - A high level of attention to detail. - Current CA qualification or equivalent experience. CPP achieved or working towards your CPP. - Has a high level of personal integrity and initiative. - Professional with the ability to maintain confidentiality. 	
<p>Demonstrate McIntyre Dick core values</p>	<p>Inspire – bring that something extra.</p> <p>People focused – care for each other at work and at home.</p> <p>Driven – own it, get it done.</p>