

JOB DESCRIPTION

JOB TITLE: Senior Client Advisor (Partner Buddy)

EMPLOYEE:

REPORTS TO:

DATED: May 2021

POSITION SUMMARY

A critical link between McIntyre Dick and the client, responsible for:

- Flow and quality of client compliance work
- Relationship between the client and McIntyre Dick
- Client owner support

Key Responsibilities	Tasks	KPIs
Client relationship management (other)	<ul style="list-style-type: none"> ➤ Communicate proactively with clients to really understand their needs. ➤ Second point of contact for two client bases. ➤ Take control of assigned client engagements. ➤ Timely response to client queries and issues. ➤ Monitor level of service to ensure it is consistent with the client's expectations. ➤ Ensure client owners are kept fully informed of progress with client engagement and any issues that may arise. ➤ Acknowledgement of receipt of email and phone messages within 24 hours. (Working days) ➤ Identify client milestones and acknowledgements. 	
Client service (other)	<ul style="list-style-type: none"> ➤ Approval of provisional & terminal tax notices. ➤ Completion of provisional tax estimates. ➤ Tax Pooling purchases. ➤ Complete billing for interim invoices, Companies Office invoices and recurring invoices. ➤ Completion of 6 monthly trust income distribution minutes. ➤ Completion of end of year minutes/tax consequences. ➤ Action client lists for various purposes. 	<ul style="list-style-type: none"> ➤ Work is completed within agreed timeframes. ➤ All billing is completed by notified close off each month.

Workflow (compliance and non-compliance)	<ul style="list-style-type: none"> ➤ Follow up & liaise with clients to get their records in for annual accounts ➤ Completion of information on B3's. ➤ First point of contact for drafters regarding client queries ➤ Sending queries to client for additional information. ➤ Contact client with queries. ➤ Completion of reviews and final checks ensuring all material queries have been cleared before client owner review. ➤ Cover for other reviewers. ➤ Client interviews for smaller clients. ➤ Identify opportunities for improvement of client systems or business in general. ➤ Any other duties as may reasonably be required of you. 	<ul style="list-style-type: none"> ➤ Turnaround on reviewing is within firm's agreed timeframe.
Service and business development	<ul style="list-style-type: none"> ➤ Identify opportunities for additional services. ➤ Sell and deliver additional services. ➤ Engage in ongoing professional development. ➤ Attendance and participation at McIntyre Dick professional development programme monthly sessions. ➤ Actively participate at coffee catch ups and internal training sessions. ➤ Develop external networks and referral relationships. 	<ul style="list-style-type: none"> ➤ Meet minimum CPD hours per annum where required to meet CAANZ requirements.
Business Advisory	<ul style="list-style-type: none"> ➤ Complete advisory tasks as required for client base ➤ Contact clients for queries. ➤ Potential new client meetings (in attendance) and preparation of proposals. 	<ul style="list-style-type: none"> ➤ Completed within the firm's agreed recovery rates
Specialities (Lead your advisory and compliance speciality)	<ul style="list-style-type: none"> ➤ Process creation and management. ➤ Provide technical advice to team and clients. ➤ Review of jobs where required. ➤ Provide any training required. ➤ Monitor financials/billing for service. ➤ Identify opportunities for improvement. 	

Qualifications, Experience and Competencies

Qualifications & Experience	<ul style="list-style-type: none"> ➤ Preferably at least 2 years' experience in a public practice firm post completion of degree. ➤ Preferably CA qualified or intending to complete
Core competencies	<ul style="list-style-type: none"> ➤ Analytical and problem solving skills ➤ Verbal, listening and writing skills ➤ Client interaction ➤ Internal communication ➤ Planning and organisation skills ➤ Management and leadership skills ➤ High level of technical competence ➤ Quality of working papers ➤ Timeliness, accuracy, responsibility, attention to detail ➤ Adherence to internal procedures
What McIntyre Dick expects from you	<ul style="list-style-type: none"> ➤ Jobs completed on time, within budget ➤ Able to manage workload, establish priorities ➤ Able to identify and address workflow issues ➤ Meet monthly KPI's ➤ Communicate clearly and in a timely manner with clients and team members
What McIntyre Dick wants from you	<ul style="list-style-type: none"> ➤ Able to relate to clients, understanding their needs ➤ Proactive in managing clients and workflow ➤ Good at identifying opportunities for additional services and getting commitment from the client to proceed with additional services
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 ➤ Humility ➤ Resilience
Demonstrate McIntyre Dick core values	<ul style="list-style-type: none"> ➤ Vibrant – Live with fun, energy, passion and that little something extra. ➤ People focused – care for each other at work and at home. ➤ Driven – own it, get it done.

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