



## POSITION DESCRIPTION

**Title**                      **Accountant**

**Reporting to**            **Directors**

## POSITION SUMMARY

To meet the business' needs by attending to client service and administrative requirements.

## POSITION RESPONSIBILITIES

### Accountant Duties

- Preparation of Individual Tax Returns including:
  - Salary and Wages
  - Rental Schedules
  - Work related deductions.
  - Investment summaries
  - Small business schedules
  - Capital Gains Tax calculations.
- Preparation of Small Business Financial Statements on Xero ledger or live Xero files as required utilising HowNow workpapers.
- Preparation of Income Tax Returns where required for:
  - Trusts
  - Companies
- Bookkeeping on live Xero/Cloud Software files when required
- BAS/IAS preparation

### General

- Answer any client queries and other information as required
- Complete timesheet daily
- Data entry

## **POSITION COMPETENCIES**

- Displays a reasonable knowledge and understanding of a professional office environment
- Displays each of the following attributes – excellent work ethic/ dedication/ punctual/ initiative/ personality/ proactive/ attention to detail/ organised.
- Confident enough to develop client relationships and build rapport with staff, business partners and clients
- To keep their workplace and work environment in a professional, clean and tidy manner
- Maturity and responsibility.

## **POSITION QUALIFICATIONS**

- University qualified preferable.

## **POSITION EXPERIENCE REQUIRED**

- Two to three years' experience in Accounting and Tax
- Experience in a professional office environment
- Excellent use of office software such as Microsoft Office, Excel, Word, and Outlook

## **GENERAL EXPERIENCE IN THE FOLLOWING WILL BE GAINED ON THE JOB IF NOT ALREADY PROVEN:**

### **All Team Members will have knowledge of and/or experience using:**

- How Now
- Workflow Max
- XERO
- Quickbooks/ MYOB – File
- ATO Portal
- BGL SimpleFund (where applicable)
- Tax Correspondence/ BAS Spreadsheet
- GST/ PAYG – Background
- Workflow spreadsheet
- Accounting/ Tax Workpapers
- Binding/ Printing/ Scanner
- Procedures – incl. Sending Faxes, lodgements, CC
- Investment – Dividends (basic franking explanation, etc),
- Checklist of Client Information
- ATO Applications/ New TFN, etc
- BGL
- Basic Bookkeeping
- Timesheets
- Draft & Prepare Bills