JOB SPECIFICATION:

Accounts Senior

Whitings
Chartered Accountants LLP

Name:		**Effective from:**	
Department:	Corporate/General Practice		
Job Title:	Accounts Senior		
Reports To:		Manager	
Hours / Days:	9.00 a.m. – 5.30 p.m.	Monday - Friday	37.5 hours
Job Summary:	Responsible for undertaking high quality accounts preparation and tax compliance services for a range of business clients including sole traders, partnerships and limited companies.		

Key Activities:

1. **Audit and Accounting**
    - Fully accountable for the provision of accounting services including corporate and personal tax returns and special services for a portfolio of clients.
    - Provide projections and forecasting information.
    - Produce VAT returns and provide an in depth knowledge and advice service to clients.
    - P11D and other payroll advice and services.
    - Utilise a variety of paperless software applications.
    - Client payroll processing for the local office, deal with queries as they arise.
    - Cloud Accounting Packages e.g. Xero, Sage, Quick Books, client help and visits.
    - CIS return – processing and certificates.
    - Undertake audit and non-audit assignments as the in charge.
    - Take responsibility for the planning, performance and preparation of draft accounts and tax computations for manager or partner review.
    - Raise bills

2. **Business Development / Client Management**
    - Develop client relationships, including regular client contact by telephone, meetings and electronically.
    - Identify opportunities for additional services.
    - Awareness of business development including representing the firm at networking events.
    - Play an active role in raising the profile of the business.
    - Display a confident, accurate and reliable accounting knowledge when interacting with clients, presenting ideas and implementing strategies.
    - Actively engage with senior staff / Partners to gain a good understanding of the business.
    - Liaise directly with business owners and accounts staff.
    - Build and maintain strong relationships with clients.

3. **Client Accounts**
    - Process client records to draft accounts stage.
    - Complete file sections and cross referencing schedules.
    - Complete work programmes and administration paperwork.
    - Attend client’s premises and assist with audit when required.
    - Contact clients for information.

4. **Tax Compliance / VAT**
    - Complete VAT return form when checked.
    - Communicate with client when VAT return is complete and submit to HMRC.
    - Prepare self-assessment tax returns, business and partnership tax returns to include detailed capital gains computations and preparation of schedules of income from property.
    - Process information on a computerised tax software to produce returns and calculations above.

5. **Company Secretarial**
    - Prepare and submit Confirmation Statements.
    - Prepare and submit other Companies House forms.
    - In charge of company secretarial work and statutory books.

6. **Staff**
    - Mentor, supervise and coach junior staff assigned and contribute to non-client work.
    - Delegate tasks effectively.
    - Review work of junior staff, ensuring quality in compliance with professional standards / requirements.

7. **General**
    - Undertake general administration tasks.
    - Effectively communicate with colleagues within the organisation to promote teamwork across the group and assist in the development of internal relationships.
    - Identify and meet personal job related training as required.
    - Provide assistance in terms of general and specific support to Partners and managers as required.
    - Undertake other reasonable work activities as determined by the Partners and managers.
    - Undertake appropriate training to ensure CPD criteria is met.