Position Description – Senior Client Manager

Senior Client Manager

Company:	Magnus Business Advisors and Accountants	**Salary:**	See salary package
Position:	Senior Client Manager 10 Years of industry experience	**Office Hours**	8:30 AM – 5:00 PM (Brisbane Time) 1Hr either side without authorisation
Location:	Capalaba	**Reporting to:**	CEO – Warren Maris

Firm Description:

Magnus is not your average suburban accountant.

We are a dedicated team of professionals looking to implement the best systems and processes to ultimately provide great outcomes for our clients and their businesses. We operate using extensive processes and procedures to establish best practices and provide a high-quality result on an ongoing basis, regardless of which team member is completing the work. Our clientele is 90% business. Magnus focuses heavily on value add services such as structuring, asset protection, business and personal succession and the Magnus Wealth Journey™. We also offer a *pro bono* program.

Magnus has actively sought to be the best place to work and grow. Your input to this process is anticipated.

Career Pathways:

Magnus is highly cognisant of the personal and professional development of our staff. We offer multiple career options, including one not offered anywhere else in the world.

Vision:

To be seen by our clients as the primary reference for business and financial matters.

Mission:

To provide high-quality outcomes for all stakeholders, team members, clients and suppliers.

Values:

- ✔ We will always act with integrity and to the profession's highest standards above all else.
- ✔ We will work together with clients to create excellent partnerships.
- ✔ We will respect all stakeholders and observe fairness tenets in our dealings.
- ✔ We will challenge the status quo and pursue the best outcomes.
- ✔ We give and expect honesty in all of our dealings.
- ✔ We:
    - o Are a business rather than an accounting practice
    - o Are focused on quality outcomes and customer experience
    - o Prefer fixed price agreements
    - o Provide coverage of business issues rather than just compliance (filling in tax forms)
    - o Are proactive (Identify and prevent issues rather than deal with them after they occur)
    - o Systems oriented (We work from Standard Operating Procedures (SOP) to provide consistent quality results)
    - o Dedicated to breaking the "glass ceiling"
    - o Holistic approach – looking at the client's personal goals and how they relate to business.
- ✔ Risk management oriented, especially around asset protection.
- ✔ Our ideal client understands the value that a great adviser can add to their business.

Our Culture:

No blame culture, we are all human, and humans make mistakes, so when you identify a mistake:

- ✔ Own up to it or discuss it directly with the person who made the mistake (no communication triangles)
- ✔ Identify what caused it and what needs to be done to stop it from happening again
- ✔ Implement corrections to the procedure to fix the problem and test that the corrections work

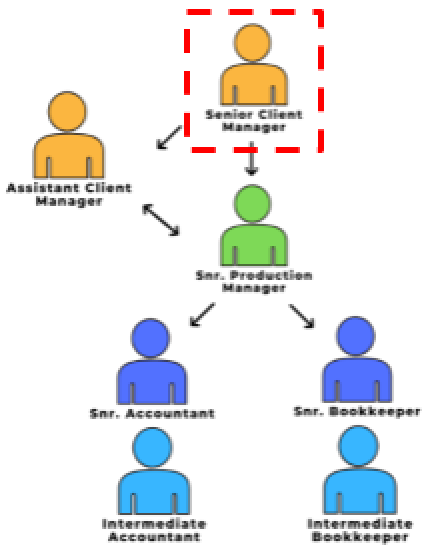
We are outcome focused and do not mind having some fun, provided the results for the clients are achieved.

Our Service Standards:

Clear client communication is a top priority, whereby we under-promise and over-provide. We expect that this will help manage client expectations and lead to less stress for our team and better results for our clients.

Current Team Structure:

Ideal Team Structure:



Senior Client Manager

Leadership Roles and Responsibilities:

- ✔ Your major role is to look after clients, servicing them in all areas of taxation advice and business advisory services.
- ✔ You will mould the current team structure into the ideal structure as the client base and your team's knowledge expands.
- ✔ You should have 5 years of experience in tax and business advisory and 5 years as a Manager or Minder.
- ✔ You will help and train your Assistant Client Manager (when appointed) with interpersonal and selling skills
- ✔ You will work with your Senior Production Manager, helping them finalise jobs and tasks.
- ✔ You will train and review the work handed to you by your Assistant Client Manager and Senior Production Manager.
- ✔ You will back up your colleague Senior Client Manager, with your technical skills
- ✔ You will train and develop the technical skills of your direct reports helping and teaching them with all aspects of financial statement preparation, tax return preparation, bookkeeping and payroll processing.
- ✔ The position requires you to report to the CEO
- ✔ Your role is to review your team's work, ensure quality, and have tasks and jobs done.
- ✔ You will build your team to generate fees of $1M+.
- ✔ In this regard, be task driven but also have an ability to work with other accountants and bookkeepers, helping and guiding them technically.
- ✔ You will be required to see clients face to face, to help our client with:
  - o strategic client meetings, called Annual General Meetings (AGM)
  - o client software selection
  - o business mentoring
  - o strategic tax planning and structuring advice

Teamwork

- ✔ Training and helping other Accountants and Bookkeepers on your team in Australia and the Philippines.
- ✔ Conducting your team members' monthly and annual performance reviews. This includes all your team members.

Soft skills

- ✔ You are required to have a high level of interpersonal or selling skills in this role.
- ✔ You should be a good leader, results and outcomes driven but with great people skills.
- ✔ You should have the ability to be an extremely good communicator of complex technical information.
- ✔ You are a natural people person and love working with and dealing with clients' problems.

Technical Requirements

- ✔ The successful applicant needs a very high level of technical knowledge and an ability to apply it to finalise Jobs for clients.
- ✔ The IPA, CPA or CA qualification is desirable but not a necessity.
- ✔ Preparing Individual Income Tax Returns with and without Rental Properties
- ✔ Preparing Income Tax Variations
- ✔ Preparing Tax Planning Figures and Analysis
- ✔ Preparing Fringe Benefits income tax returns
- ✔ Preparing Financial Statements for:
  - Sole Traders
  - Partnerships
  - Trusts
  - Companies
  - Self-Managed Superannuation Funds
- ✔ Preparing Income Tax Returns for:
  - Sole Traders
  - Partnerships
  - Trusts
  - Companies
  - Self-Managed Superannuation Funds
- ✔ Use of the following software
  - QuickBooks
  - MYOB Accounting
  - Xero Accounting (90% of Clients are on Xero)
  - Xero Practice Manager and Tax
  - Microsoft Products (Word, Excel, Outlook and PowerPoint)
  - Class Super
  - NowInfinity

Detailed Technical Knowledge Requirements:

- ✔ Non-commercial loss rules
- ✔ Division 7A loans
- ✔ Individual Tax claims
- ✔ Small Business advice – WorkCover, Stamp Duty, Payroll tax, FBT etc
- ✔ Non-Small Business advice
- ✔ CGT SBE Business Concessions
- ✔ Depreciation rules
- ✔ CGT Calculation on Sale of Property and Shares

- ✔ SGC Obligations
- ✔ Franking Accounts and the dividend imputation system
- ✔ Family Trust Elections
- ✔ Completion of Co-invest administration
- ✔ Taxable Payments Annual Reports
- ✔ Tax minimisation strategies

Accountabilities:
Senior Client Manager – Monthly Performance Review and 360 Feedback.

TINYpulse - Performance Feedback System.

Each month you will speak with the CEO face to face and you will both rate the below core accountabilities.

Team Workflow Management	Reviewing Work	Productivity % Chargeable hours
Internal Responsiveness to Emails & Phone Calls	Plan work & Goals Ahead	Cooperation with Team Members
Positive & Enthusiastic Attitude – solutions focused	Reliability – on time to work	Feedback to the CEO or Partner
Your TinyPulse Rating by your direct reports	Clients – Returning Client's Calls and Emails	Quality of Working Papers
Following Procedures and systems	Ability to deal with complex issues	Preparing jobs to Budget/Timeframe

Professional Development:

We expect that professional association requirements will be substantially exceeded.

- ✔ You will stay abreast of new technologies and taxation laws.
- ✔ Attendance at Australia located Xerocon
- ✔ IPA\CPA\CA\NTAA Tax and Tax Planning workshops are highly recommended.
- ✔ Any CPD hours also need to be met.
- ✔ It is also expected that you visit your Philippines team at least once every 2 years for 1 week.
- ✔ You will be provided with a budget for professional development

App Stack

Magnus is committed to automation and the elimination of drudge work by the team. We are completely cloud-based. As such, we have a large number of web applications. They include:

- ✔ Xero (almost all clients)
- ✔ QuickBooks Online and MYOB
- ✔ XPM
- ✔ Ignition
- ✔ NowInfinity
- ✔ Practice Protect
- ✔ LightYear Docs
- ✔ ACIS
- ✔ FuseSign
- ✔ Change GPS
- ✔ Value Builder System
- ✔ Wize Mentoring
- ✔ Simon Lu Coaching
- ✔ KnowledgeShop
- ✔ Active Campaign
- ✔ Time Doctor
- ✔ Survey Monkey

The Environment:

- ✔ State-of-the-art workstations
- ✔ Modern, comfortable premises
- ✔ Amazing App stack
- ✔ Commitment to automation
- ✔ High emphasis on quality outputs via procedure-based methods
- ✔ An agreed, dynamic career path, including an option that does not exist anywhere else in the world
- ✔ Massive investment in intellectual property, marketing and automation
- ✔ Competitive remuneration
- ✔ Outstanding values and culture, including a pro bono program

- ✔ Quality clientele, the vast bulk of whom are business customers
- ✔ An advisory program that includes business development, asset protection, personal succession and exit advice
- ✔ A longstanding offshore support and production team
- ✔ Work-from-home
- ✔ Totally cloud-based operations
- ✔ A premium employee equity plan for qualifying staff

Salary Package and Benefits:

- ✔ A generous salary including superannuation reflecting experience and performance expectations will be agreed
- ✔ Work-from-home options
- ✔ A premium employee equity program