

Job Description

Client Services Manager

Responsible to : Principal / Directors

General Purpose

This job description is designed to assist in your understanding of what is required to successfully complete the role as Client Services Manager. It is not designed to be a prescriptive all encompassing list of tasks.

“To be an effective member of the Nick Hoogveen & Associates team”

Within the general function of this role, some specific tasks and responsibilities included in this Job Description may be amended by the employer from time to time, to reflect the on-going development of operational practices.

Position Key Tasks & Responsibilities

- Preparation of draft financial statements for review, from the source documents provided by clients, involving the coding of records and preparation for data processing.
- Completion of draft Tax calculations, preparation and filing Income Tax returns.
- Preparation of GST Returns and filing with Inland Revenue
- Preparation of Cashflow Budgets and Management Reports as required.
- Attain working knowledge of the computer system, processing journal entries and printing reports.
- Communicating directly with clients and IRD to resolve issues regarding their affairs as required/instructed.
- Maintaining electronic diary records as required for time recording.
- General office clerical and other duties as required.

Desirable Experience, Skills and Personal Attributes

Experience

- Have an understanding of the NZ general taxation requirements, including Income Tax, GST, PAYE and FBT, applicable to self employed business clients.
- Have a working knowledge of computers and associated general software packages in particular Microsoft Office.
- Be familiar with accounting software packages, e.g. Cash Manager, MYOB.

Skills

- computers and relevant software applications
- good spelling and command of the English language
- good listening skills
- good verbal and written communication
- good with figures/math
- keyboard/calculator
- adhere to the requirement for accuracy and confidentiality

Personal Attributes

- reliable, healthy, honest, discrete
- assertive, confident, a pleasant friendly nature
- attention to detail and shows initiative
- professional personal presentation
- able to work alone or with others
- commitment to safe work practices
- stress tolerance
- efficient and timely
- enthusiasm and a willingness to learn
- a team player who contributes and is prepared to assist others

Performance Evaluation

The performance of the incumbent will be monitored regularly and formally evaluated on an annual basis by the Directors.