



ROGER KLOSTERMAN & CO. CPA

## **Staff Level Client Advisory Job Posting**

### **Staff Level Client Advisory Team Member**

Are you ready to work differently? Are you ready to take your knowledge of tax and accounting and use it to transform client relationships? Are you ready to use your knowledge, skills, and abilities to be part of a team that strives to make clients better?

If so, we would like to hear from you!

Roger Klosterman & Company, LLP has re-imagined the way we service clients by leading the relationship with Advisory Services. The tax return is the end result of strategic planning. We have moved from the traditional historian role to a proactive, strategic partner.

Through Advisory Services, Roger Klosterman & Co, LLP partners with our clients through educating and implementing tax efficient business strategies.

### **As a member of the Client Advisory Team, you will have the opportunity to work closely with our clients to**

- Prepare and review tax returns while assuming primary responsibility for client engagements including scheduling, staffing, timing, technical issues, and additional duties as needed
- Work directly with clients to request information, provide information, and answer questions
- Perform accounting and bookkeeping services for clients
- Be more than just the “Tax Person”

### **Additional Duties and Responsibilities**

- Develop your advisory and maintenance knowledge, skills, and abilities for continued growth and responsibility opportunities
- Initiate solutions to problems and continue to develop technical expertise to improve professional judgment
- Follow regulations and professional ethics of the AICPA and the State Society

### **Core Competencies**

- Strong working knowledge of applicable software programs to produce finished products
- Actively pursues on the job learning and formal learning to develop and refine skills and competencies
- Meets time constraints, budgeted goals, and client deadlines



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- Participates in planning and scheduling of client engagements
- Organized, capable of prioritizing work, and conscious of the importance of time management
- Able to adapt to changing conditions and perform under pressure
- Actively listens to others and promptly responds to client and staff inquiries
- Demonstrates professionalism in manner and appearance, contributing to positive morale
- Treats co-workers with courtesy and consideration
- Maintains a positive and cooperative attitude

### **Client Service Competencies**

- Develops strong working relationships with clients
- Understands client's industry and business and is able to recognize potential opportunities
- Provides the highest level of customer service. Helping clients feel important and appreciated through courteous and friendly behavior at all times over the phone and in person
- Takes responsibility for quality client service

### **Qualifications**

- Bachelor of Science in Accounting required
- CPA license (must have 150 hours to sit for the exam at a minimum)
- 1-2 years accounting and tax experience
- Demonstrate leadership, problem solving, and strong verbal and written communication skills
- Ability to set and work with goals, objectives, and deadlines
- Experience with various tax, audit, and bookkeeping software

### **Benefits**

- PTO/Vacation
- Flexible Summer Schedule
- Health Insurance
- Flex Plan
- Simple IRA
- Required Continued Education
- CPA Activities/Membership Dues
- Mileage Reimbursement
- Casual dress code



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### **Compensation**

- Based on skill set, experience

### **Office Environment / Schedule Requirements**

- This position offers a great opportunity to work in a high energy, small office environment.
- Extended hours required during certain times of the year