

Staff Accountant Job Description

Basics

- Must have 3+ years as an accountant or bookkeeper (working with business owners a plus).
- \$50,000 to \$60,000 total compensation (perhaps higher if you're a rock star).
- Periodic bonuses for obtaining goals well within your purview.

Watson CPA Group Benefits

- Health insurance reimbursement thru HRA (makes it flexible for you)
- Group life insurance (\$50,000)
- Short term and long term disability insurance
- 401k plan (no matching currently, see expensive new office below)
- Flexible hours (core is 8:30AM to 4:30PM)
- 16 days of paid time off
- Work from home available
- Closed most Fridays May thru November (yup, 3 day weekends summer and fall)
- Small enough where you can make a difference (www.watsoncpagroup.com/team)
- Brand new \$1.7M, 6,500 square foot standalone office opening in 2019

www.watsoncpagroup.com/office

If this fits, read on-

Who We Are

The Watson CPA Group is a small local accounting firm in Colorado Springs who only engages with small business owners (S Corps, Partnerships, PCs) and complex individual tax preparation. We take a consultative approach to our client engagements by offering unlimited consultation and a strong focus on planning. Tax return quality naturally occurs from periodic client interaction throughout the year.

We currently have five CPAs and three EAs, with two more obtaining licensure in the next 6 months. With our steady growth, we are in need of another experienced business oriented accountant or tax professional to adopt current clients as their own and run a team (tax preparers, admins).

Job Duties

You will be working with Tax Managers in calculating salary and tax projections, entering payroll, preparing tax returns, tracking down missing information, among other tasks related to accounting and taxes.

Technical

Our next accountant will have unfettered experience as a and with the following-

Technician

3+ years working in the accounting industry performing similar job duties.

Business Topics

Must be familiar with basic business concepts, entities structures and business tax deductions.

Payroll Expert

We use ADP as our payroll processor for our business owners, especially S Corps. You must understand payroll and the journal entries surrounding payroll accounts. You will not be preparing and filing payroll tax returns, but you must be familiar. If you see \$20,000 leave a business banking account, you should be able to guess what is wage expense and what is payroll tax expense. This must come naturally or at least make sense to you.

Debits and Credits

You must be able to walk around QuickBooks and Xero, and be able to clean things up, generate financial statements, prepare a tax return and provide journal entries back to the client. Debits and credits must come naturally. Yes, they must also equal.

Penny Perfect

You must be able to determine materiality quickly, and be willing to accept less than desirable data from the client. **We are not here to audit the client's data, shame the client for having negative balance sheet accounts or crawl into their world with microscopes.** However, we are not here to file junk tax returns either. You need to be able to slide around on this spectrum depending on all the presented factors, risks and materiality.

If a small business does not have a balance sheet, you need to be OK with that and maintain this data inside of a tax return. Just because we love balance sheets doesn't mean everyone must.

Excel

Spreadsheets are only meaningful to the spreadsheet designer therefore you need to be able to generate a workpaper that someone else can follow without a lot of hand-holding.

Finding a Way to Say Yes

Accountants routinely say No without helping a client understand and eventually position themselves where a Yes is obtainable. We swim in grey waters with slivers of black and white, and while we are a self-policing industry we are also the client's advocate (as opposed to the government's).

We are going to test the heck out of this during the interview. That's the technical side. Now the HR side-

Human Resources

Our next accountant will have these humanistic qualities-

Playful

We are not dull or stuffy. We throwback beers and cocktails at 3:01PM on Fridays during tax season since drinking before 3:00PM is considered irresponsible.

We take the work that we do seriously, but we don't take ourselves seriously.

Hustle

If you approach everything with the same level of energy, this isn't the firm for you. Yes, we mess around and have a laugh. No, we not all business all the time. But... when there is a pile of crud on your desk, you need to find that tax gear and get a move on while maintaining accuracy, customer service and work attitude.

Approachable

You must be able to take the bad with the good. Accounting is inherently a negative business since all we do is look for things that are wrong. If you are looking for only kudos, hugs and rainbows, then this will be a tough environment. If you are a professional looking to improve your craft, then you'll fit right in. We want to do a better job tomorrow than we did today.

Procedure Oriented

We've created training manuals, procedures and checklists. While we leave room for anomalies and outliers, we need you to embrace the concept of standard operating procedures.

Mentor Skills

You must be able to mentor others on your team, manage their work flows and critique their work product. If you don't like having difficult conversations and prefer to hope things change naturally, this position might not be for you.

Timeline

If you are reading this, our timeline is in the next 6-8 weeks.

How to Apply

Download a huge 47-page fillable PDF and follow the instructions. Just kidding... it is only 3 pages of stuff we actually need you to think about today and another 3 pages of interview questions to prep for. And... we've added it after this page to make it easy.

If you believe that a professional should not have to resort to applications and that your resume encompasses all that you are, then we've already learned enough to say No Thanks. Otherwise, we suggest giving us 20-30 minutes of your time for a possible 20-30 year career. Low risk. High reward. Turn the page, like Bob Seger-

Staff Accountant Job Application

Contact Info

Name _____

Address _____ City, Zip _____

Email _____ Cell Phone _____

Self-Rated Job Skills

QuickBooks	Excellent	Good	Average	Shaky
Excel	Excellent	Good	Average	Shaky
State Nexus, FBA	Excellent	Good	Average	Shaky
S Corp Biz Concepts	Excellent	Good	Average	Shaky
Payroll	Excellent	Good	Average	Shaky
Balance Sheet, Equity A/Cs	Excellent	Good	Average	Shaky
1120S	Excellent	Good	Average	Shaky
1065	Excellent	Good	Average	Shaky
Investment Concepts	Excellent	Good	Average	Shaky

Easy Questions

Do you know your credit score? Yes No

Do you have any derogatory remarks on your credit report? Yes No Don't Know

Do you have any background issues that we will find? Yes No

Were you ever fired or asked to resign from a previous job? Yes No

Application Questions to Answer

What is your threshold for figuring things out yourself versus asking for help?

What is your method of learning?

Why are you considering public accounting as a profession? What do you like about tax? Did you lose a bet?

The accounting industry is generally negative. We look for things that are wrong first and define accuracy in the negative (nothing wrong = accurate). How would you fit into this environment?

Why did you leave your previous job? Or... why are you snooping around at a new one?

Instructions

Review the job requirements on our website at- www.watsoncpagroup.com/jobs

Email this application along with a single-page resume to jobs@watsoncpagroup.com. No calls. No faxes.

Interview Questions to Prepare For

How would you tell a team member that their work product was wrong? Or, not wrong, but could use improvement?

How would you tell a partner that his/her work product is wrong? Or that you have a better idea.

Describe how you interact with a team. Describe your approach to managing a team (other tax pros and admins).

What type of office mates drive you nuts? Love?

What things are important to you in a career or job? What things could you not care less about?

Describe your ideal office atmosphere.

Describe your work speed and how you manage your work flow versus quantity and deadlines.

As a professional, what parts of your craft would you want to improve? Why? And what have you done to do that in the past?

How do you respond to an "equal" reviewing and critiquing your work product?

What motivates you to do a good job? Internal? External?

What would you do if a client is lying to you, but you can't prove it. For example, a mileage log appears fabricated- how would you handle that?

Tell us about a time when you argued with a client and afterwards you were wrong. Same situation, but with another co-worker or team member?

Has a client ever bullied you into a position you were uncomfortable with? Do you have an example? What did you do?

How are you a client / customer advocate?

Do you have an example of where you found a way to say Yes to a client when others said No?

Describe your organization skills? How would you stay on top of deadlines? What system do you use now for your personal life?

Why do you think procedures and checklists are important?

Are you afraid of making a mistake? What is your risk aversion?

How do you want to be corrected or critiqued?

How do you handle being told to do something a different way than you were taught or prefer?

Why do you like tax preparation?

What tax software have you used? What did you like about it? What did you hate?

What errors have you made on a tax return? On a financial report? Did you tell the client? How?

When preparing a tax return with a disorganized client, at what point do you think it is “good enough”? At what point would you recommend disengaging?

Why is an S corporation election beneficial? How does it save the client taxes?

What situations would an S corporation not be recommended?

How would you go about making a salary recommendation to an S Corp owner?

Describe state nexus. How does this affect sales tax? How does this affect income tax?

How do you approach making recommendations for 401k contributions? Pre-tax or post-tax?

How does a client get taxed for distributions in excess of basis? What things should you look at when this occurs?

How would you journal officer compensation and reimbursements against distributions?