



**Job Title:** Assurance Associate

**Department:** Assurance

**Reports to:** Senior Assurance Associate/Assurance Supervisor/Assurance Manager

**Level:** Exempt

**Location:** To Be Determined

**Last updated:** April 2020

### **Summary of Responsibilities:**

An associate is responsible for a wide variety of assurance assignments under the supervision of different professionals.

### **Essential Functions:**

- Complete all tasks assigned in a timely and efficient manner according to instructions.
  - An example of tasks may include:
    - Testing cash
    - Testing fixed assets
    - Draft Financial statements
    - Budget to actual comparisons and fluxes
- Follow all professional standards, GAAP, GAAS, ethics, etc
- Address client needs/requests as necessary
- Develop technical expertise
- Prepare and index working papers
- Participate in job planning sessions understanding the need for consistency on jobs as well as customization.
- Actively establish plans to meet deadlines in advance and maintain accountability for self and client-assigned tasks keeping senior/mgr informed of progress.
- Actively seek most efficient approach in adding value to jobs eliminating wasted, non-value added tasks.
- Actively seek work to meet chargeability goals.
- Complete administrative duties timely (i.e., time entry and tasks list).
- Train intern or other team members as assigned.
- Set individual goals that support departmental and firm goals.
- Perform other duties as assigned.



### **Education, Experience, and Skills:**

- Bachelor's degree in accounting from an accredited college or university
- Working knowledge of Microsoft Office.
- Complete assigned CPE or professional development courses as required annually.
- One to two years audit experience.
- Desire to obtain CPA license.

### **Expectations:**

- Respect and earn the respect of fellow team members
- Take ownership of identified processes and responsibilities
- Keep open communications with manager, team and leadership
- Perform work with confidence and pride, follow through to completion
- Dependable
- Make informed decisions – discuss with manager when needed
- Grow and learn from past mistakes
- Work in a safe, clean and employee friendly atmosphere
- Work personal/professional development plan
- Must have flexibility with work schedule
- Follow Independence requirements
- Follow Firm policies and procedures

### **Working Conditions:**

- Minimal hazards
- General office working conditions
- Occasional heavy lifting
- Periodic evening and/or weekend work
- Travel as needed

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