

# Smith Marion & Co., LLP Job Description

## MANAGER

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TITLE: Manager  
CLASSIFICATION: Full-time, exempt  
REPORTS TO: Partners

### SUMMARY OF RESPONSIBILITIES

Managers are essentially partners-in-training, and are involved in almost of all the areas for which partners are responsible. They have exhibited technical proficiency and the ability to supervise and complete engagements, possess a thorough knowledge of the firm's policies and procedures, and serve as intermediaries between partners, clients, and senior accountants. Managers possess the experience and overall potential necessary to be considered for admission as a partner in the firm.

### ESSENTIAL FUNCTIONS

- Posses a command of pertinent IRS/audit/industry/etc regulations and/or guidelines.
- Assume responsibility for planning, supervising, and completing engagements.
- Plan the timing and assigning of staff to engagements.
- Review engagement workpapers, resolve any problems, and keep the partner informed of all important developments in the engagement.
- Possess a complete understanding of firm technology, including the use of computers, email, and the Internet; and the use of Microsoft Word, Excel, and PowerPoint; and firm tax preparation and time and billing software.
- Prepare client billings.
- Evaluate the performance of senior accountants.
- Develop new client contacts and relationships beneficial to the firm.
- Assist in administrative functions as assigned by the partners.
- Recognize opportunities to provide additional services to existing clients.
- Perform other duties as assigned by the firm's partners.

### WORKING CONDITIONS

- Job involves work in the firm's office or on the client's premises. Work on the client's premises may require the use of the manager's personal car.
- Overtime hours expected.

### EXPERIENCE / TRAINING

- Managers normally have a minimum of three years experience as a senior accountant (or equivalent experience as deemed appropriate by the partners).
- Managers are generally licensed as certified public accountants.
- Possession of strong organizational skills.
- Ability to work independently on assigned task as well as to accept direction on given assignments.
- Able to work effectively with staff members and clients.

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The above noted job description does not list all the duties of the job; you may be asked to perform other assignments and duties. This job description is intended to give a general sense of the responsibilities and expectations associated with the position. You will be evaluated in part based on your performance of the tasks listed above. The firm's management has the right to revise this job description at any time.