

## POSITION PROFILE

**POSITION TITLE :** MANAGER BUSINESS SERVICES  
**REPORTS TO :** Partner  
**APPROVED BY :** Partner  
**APPROVAL DATE :**

### **SUMMARY**

Has an ability to handle an already established portfolio of clients, working within a Business Services team dedicated to meeting clients business goals.

Preparation of financial statements, tax returns, business plans, loan applications, business activity statements and installment activity statements for clients.

Demonstrates an understanding of practice management and the marketing of services to clients. Is able to develop personnel and manage work load in a professional and effective manner.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following, but other duties may be assigned.

- Interprets taxation laws to enable clients to structure their business transactions for the maximum benefit
- Forward plans income and expenses in order to minimise tax
- Attends to completion of statutory lodgment responsibilities on behalf of clients
- Advises clients on a wide range of business issues
- Prepares budgets and cashflow forecasts to assist with business decisions and finance applications
- Analyses financial data to identify strengths and weaknesses
- Takes responsibility for WIP and debtor management
- Meets chargeable hours and billings as stipulated

### **BUSINESS PROMOTION**

The Group is continually growing and expanding its client base, and it is inherent in the role that employees endeavor to develop the client base of the Group where possible.

### **SUPERVISORY RESPONSIBILITIES**

Manages team members, and is responsible for the overall direction, coordination, and evaluation of them. Carries out supervisory responsibilities in accordance with the Group's policies.

Responsibilities include training employees; planning, assigning, and directing work; addressing complaints and resolving problems.

### **EDUCATION**

- Bachelor's degree (Business or Accounting).
- Five plus years related experience.
- Completion of the CA Programme.
- Broad range of professional specific disciplines.



Liability limited by a scheme approved under Professional Standards Legislation

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## **COMMUNICATION/PRESENTATION SKILLS**

Ability to:

- read, analyse, and interpret common technical journals, financial reports, and legal documents
- respond to common inquiries or complaints from clients, regulatory agencies, or members of the business community
- prepare clear and succinct correspondence and to demonstrate a high level of skill and confidence when presenting to clients, public groups or team members in a formal or informal context
- influence through the use of logical and rational arguments to support point of view and displays ability to resolve issues through negotiation.

## **TECHNICAL SKILLS**

Demonstrates:

- a high level of technical expertise in particular practice area
- attendance to work promptly and efficiently
- an ability to analyse commercial relationships and the impact of current accounting decisions, legislation and areas of business advice outside own practice area on clients
- an efficient and structured approach to decision making and generates a range of options and solutions.

## **REASONING ABILITY**

Application of:

- an ability to define problems, collect data, establish facts, and draw valid conclusions
- an interpretation of an extensive variety of technical instructions.

## **PLANNING AND ORGANISING**

Ability to:

- establish priorities and effective planning
- combine a professional and commercial approach to matters and monitors progress against budget
- effectively allocate resources and controls and evaluates progress against budget
- process bills in a timely manner and manages debtors
- use Microsoft Windows and Office products including e-mail and the Internet.

## **CLIENT SERVICES**

Ability to:

- demonstrate an understanding of client business and trends
- develop a close relationship with clients that is built upon mutual respect and trust
- make suggestions to improve service level and reviews work regularly to ensure quality standards are met.

## **PEOPLE MANAGEMENT AND DEVELOPMENT**

Capacity to:

- contribute to team effort and seeks out leadership opportunities
- be supportive of others and is an active contributor to the Group's activities
- delegates tasks and sets clear expectations
- demonstrate consistent achievement of standards, takes initiative and seeks responsibility.

## **SELF MANAGEMENT AND DEVELOPMENT**

Demonstrates:

- keeping up-to-date and ensuring team members are advised of changes in area of expertise
- a willingness for continuous improvement in bringing in new clients and extra business from existing clients.

**CERTIFICATES**

CA Programme and a broad range of professional specific disciplines  
Current Drivers' Licence