POSITION DESCRIPTION	
Position Title	**Client Manager**
Reports to	**Business Manager (CEO)**
General Description	To care for a portfolio of clients on a range of compliance and business advisory issues.

Team Responsibilities	**System**
Embrace the Mission of the business.	▪ Mission Statement.
Understand how we work with and build relationships with our clients.	▪ The Basis of Our Client Relationships.
Adhere to our client service standards.	▪ Client Service Standards.
Professionally handle client queries.	▪ How to Handle Client Queries.
Professionally handle client complaints.	▪ Dealing with Complaints.
Be familiar with Our Firm's Areas of Operation.	▪ Our Firm's Areas of Operation.
Conduct our business in compliance with ethical practices.	▪ Ethics.
Adhere to the Health and Safety Policy.	▪ Health and Safety – How We Do It Here.
Assist in answering incoming telephone calls.	▪ Telephones – Answer Incoming Calls.
Assist in delegation by becoming familiar with the CFAQ system. (Clients Frequently Asked Questions.)	▪ CFAQ Index.
Maintain detailed and accurate time sheets.	▪ Timesheets – Entering Hours Worked.

Individual Responsibilities	Systems
Accounts Preparation	▪ Care for a portfolio of clients, preparing their accounts and utilising systems including:
	▪ Accounts Preparation
	▪ Accounts Workpapers – Indexing and Completion
	▪ Accounts Preparation – Review General Ledger
	▪ Annual Returns
	▪ BAS Preparation
	▪ Budgets Cashflow Forecasts
	▪ Attending to the requirements of Companies
	▪ Attending to the requirements of Trusts
	▪ Preparation of Annual Profit Estimates ▪ Preparation of Tax Management Plans
Business Advisory	▪ Care for a portfolio of business clients, advising them on issues including:
	▪ Preparation of Business Plans
	▪ Preparation of Business Appraisals
	▪ Preparation of Information Memorandums for sale of businesses
	▪ Finance Applications

	▪ Share Valuations
	▪ Assisting and advising clients before, during and after Australian Tax Office audits:
	▪ Preparation of ATO compliance reviews
	▪ Routine GST audits
	▪ Income tax investigations
	▪ Arranging suitable debt repayment programs for clients with taxation arrears
Personal Income Tax Returns (ITR)	▪ Manage a range of Personal Income Tax Returns (ITR) issues, including:
	▪ ITR – Personal Income Tax Preparation
	▪ ITR Assessment Advising Clients
	▪ ITR – Indexing
FBT System	▪ Manage a range of Fringe Benefits Tax (FBT) issues, and utilise systems, including:
	▪ FBT System
	▪ FBT Info Gathering Procedure
	▪ FBT Completion Procedure
	▪ FBT Calculation Procedure
Superannuation	▪ Care for a portfolio of clients on a range of superannuation issues, including:
	▪ Self Managed Superannuation Funds

	▪ Setting up a self managed superannuation fund
	▪ Planning for Self Managed Superannuation Funds
	▪ Investment Review for Self Managed Superannuation Funds
	▪ Surcharge for Self Managed Superannuation Funds
	▪ Tax Payment Reminders for Self Managed Superannuation Funds
	▪ Year End Compliance for Self Managed Superannuation Funds
Other related responsibilities	▪ Monitor Client Management Reports for underlying business improvement issues
	▪ Preparation of client business benchmarking reports
	▪ Evaluate client accounting systems
Admin	▪ Preparation of workflow reports for Accountants in your team
	▪ Preparation of workflow reports for your own client work