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## Accountant (Client Manager)

**Role:** Accountant (Client Manager)

**Location:** 8 The Briars, Waterloooville. PO7 7YH

**Contract type:** Permanent, employed

**Salary:** Negotiable (£25,000.00+) – dependent on experience.

**Benefits:** Flexible working environment and access to an Employee Assistance Programme

**Hours per week:** Monday – Friday. 9:00 - 17:00 (at least 17:00 finish is essential).

**Reporting to:** Senior Accountant

If you feel you would be **FANTASTIC** in this role, then please could you fully complete the [application form](#) return via email. You can download a word version [HERE](#).

### Job Purpose:

At Heelan Associates we are passionate about business. Our team of accounting professionals are commercially focused, putting our client's needs first. Our mission is to use our years of experience and skills in accountancy to create a personalised service that helps businesses to realise their potential for growth. As part of a highly enthusiastic team of 19, you will play a crucial role, building relationships with a growing client portfolio and delivering their key work. This role will be exceptionally exciting to a candidate looking to make use of existing qualifications and manage their own client portfolio in a rapidly growing, innovative and 'modern' business.

### Key responsibilities:

- To prepare accounts & tax returns for our clients, including Sole Traders, Partnerships and Limited Companies.
- To assess and advise clients on their tax position. To optimise and plan the tax efficiency of clients were required.
- To communicate regularly with clients via phone, email, social media and in person.
- To attend networking events where required.
- To review (and on occasion prepare) book-keeping and VAT returns.
- To act as liaison between clients and HM Revenue & Customs to deal with and resolve queries.
- To maintain electronic filing of books and records.
- To participate in activities necessary to support the smooth running of the office environment.
- To manage and maintain your professional development and learning.

### General duties and flexibility:

- To attend training and development deemed necessary for the post in agreement with the line manager.
- To willingly undertake any other tasks as reasonably requested by line managers and comply with all employee policies and procedures of Heelan Associates.
- This job description is indicative of the range of current duties and responsibilities for the post, it is not comprehensive. It is inevitable that the duties will change to reflect the evolving needs of our business and that they are regarded with a degree of flexibility, so that needs can be met. All changes will be discussed with the post holder.

## Person Specification

### Experience

- Must be qualified to AAT Level 4 (or equivalent) or above.
- Sound tax knowledge.
- Experience working in practice within the past 5 years.
- A sound working knowledge of QuickBooks and Xero is desirable (but not essential as training can be provided).

### Skills

- Good standard of verbal and written English.
- Proficient IT skills (Excel & Word essential).
- Detail orientated with an eye for accuracy.
- Excellent time management skills and the ability to prioritise.

### Personal Attributes

- Committed to providing exemplary customer care.
- Enthusiastic and well presented.
- Flexible and adaptable.
- A real desire to help the team and willing to go the extra mile to help others during busy times.

If you feel you would be FANTASTIC in this role, then please could you fully complete the [application form](#) return via email. You can download a word version [HERE](#).

**If you have any questions in advance on the role, please don't hesitate to call.**

Mrs Samantha Heelan (HR Manager) – [samantha@heelanassociates.co.uk](mailto:samantha@heelanassociates.co.uk)

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Instagram: [www.instagram.com/teamheelan](http://www.instagram.com/teamheelan)

Twitter: [www.twitter.com/HeelanAssocs](http://www.twitter.com/HeelanAssocs)

Facebook: [www.facebook.com/HeelanAssociates](http://www.facebook.com/HeelanAssociates)



**Registered office:** 8 The Briars, Waterlooville, Hampshire, PO7 7YH. **Registered company number:** 05705976