



Role: Accountant (Client Manager)

Location: 1 The Briars, Waterlooville. PO7 7YH

Contract type: Permanent, employed

Salary: Negotiable (£30,000.00 - £45,000.00) – dependent on experience.

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

Hours per week: Monday – Thursday 9:00am - 5:00pm, Friday. 9:00 - 4:00pm

Holidays: 5.6 weeks, plus birthday and Christmas off (additional to the 5.6 weeks).

Reporting to: Senior Accountant

Job Purpose:

We are growing our team and we would love for you to join us.

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 small businesses start, survive and grow.

As part of a highly enthusiastic (and growing!) team of 25+, 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

Essential:

- Must be able to prepare accounts & tax returns for clients, including Sole Traders, Partnerships and Limited Companies.
- Must hold membership to a professional body (does not need to be a chartered body)
- Be confident in providing direct advice to clients.
- Sound tax knowledge.
- Experience working in practice within the past 2 years
- Good standard of verbal and written English.
- Proficient IT skills (Excel & Word essential).

Desirable:

- A sound working knowledge of QuickBooks and Xero

Personal Attributes:

- Being able to work to tight deadlines both internally and externally (HMRC).
- Excellent attention to detail.
- To be able to communicate at all levels, across the company and to clients directly.
- Well-presented and dresses appropriately for an office environment with a friendly and positive attitude.
- Self-motivated and confident to ask for help if needed.
- Excellent time management skills and the ability to prioritise.

If you feel this role is for you, please contact us here, or at the above address with a letter/email outlining why you feel you would be fantastic for the role, and a little information about you.

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

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www.heelanassociates.co.uk