



**wellers**  
business oxygen

# Senior Job specification

## Being part of Wellers

- Requires recognising and embracing Wellers' values;
- Requires integrity and means that I will be open, honest and fair in my dealings with others.
- Involves a relationship and means that we can totally rely on one another.
- Requires commitment and means that I will do what I say I will, when I say I will.
- Is to be successful, which means that Wellers grows, by helping clients to succeed.
- Requires initiative which means looking for all solutions and delivering advice and services to an exceptional standard.

## Your role within Wellers

Wellers is proud to be an ACCA Platinum training organisation and as such the role of a senior, as part of the team at Wellers is an important one. As an organisation we invest substantial time and effort in ensuring our people are provided with the opportunities to develop in the workplace.

Your work will be mainly office based with the team however; at times you may be required to attend client premises where you will be representing Wellers.

As a senior, you will be expected to fulfil the role requirements of a Wellers' trainee and in addition, you will be expected to:

- Provide support to more senior colleagues by producing work without the need for fundamental amendments, and to agreed timescales.
- Assist with running a team by providing basic direction and support to more junior members of staff.
- Proactively develop technical knowledge through a combination of workplace learning and formal study whilst demonstrating flexibility in being able to apply this across the clients that you work on.
- Apply experience gained as a trainee and during your role as a senior to review Wellers' approach to each client and deliver best practice.
- Use self-review and analytical review techniques to minimise possible errors.
- Understand the Wellers Business Oxygen position and promote this in communications with the right clients.

## Duties and responsibilities

There are various key areas in which we would expect you to gain proficiency. This is not an exhaustive list but instead an indication of the responsibilities that are expected of Wellers' seniors.

### 1. Technical knowledge

- A comprehensive understanding of the fundamental principles underpinning bookkeeping, accounts, audit and tax.
- Stay up to date with legislation that is relevant to Wellers clients across a cross section of core services.
- Ability to communicate and explain the relevant issues and their impact in a clear and concise manner.
- Consistently apply new skills through work based learning or formal study client based work, to reduce manager input where possible.
- Demonstrate regular and consistent sharing of skills and knowledge with Wellers personnel.

### 2. Accounts

- Drafting statutory accounts in the prescribed Wellers format, ready for discussion with the client having dealt with queries during preparation, without supervision.
- Consistently demonstrate a methodical and efficient approach to accounts production continuously identifying efficiencies where possible.
- Ability to complete all key reconciliations and analysis under own initiative without supervision.
- Prepare meaningful and useful notes, highlighting problem areas and issues of relevance/interest to the manager.
- Demonstrable ability to assist junior staff with basic accounting procedures, bank reconciliations etc and setting up files in Wellers format.
- Proven commercial awareness and ability to manage work in progress budgets and communicate potential overruns.
- Consistent and regular communication with more senior members of staff on the stage of completion of work set.
- Seeks feedback from those reviewing your work and applies action points immediately to future tasks.

### 3. Management accounts

- Takes responsibility for the production and delivery of fully reconciled draft management accounts which are presented with meaningful analytical review, having ensured that all queries have been fully resolved with the client.
- Ability to understand and interpret results and communicate thoughts both verbally and in writing.
- Ensure that work is always carried out in the most efficient manner or that prompt recommendations are made to remove inefficiencies that cannot be immediately addressed.
- Demonstrate a sustained review of processes and work patterns so that work is completed effectively. Proactive in addressing issues that impact on agreed budgets, communicating with managers and making appropriate recommendations.
- Can prepare and review VAT returns with equal ability. Able to understand and explain the benefits of choosing one VAT scheme over another.
- Ensures that deadlines are consistently met by proactively managing and prioritising workload.

### 4. Audits

- Ability to work under own initiative as part of the audit team, performing audit tests, analytical review and other audit work as instructed by senior colleagues.
- Full understanding of core assumptions underpinning audit tests across the audit programme.
- Ability to plan sections of the audit as required by senior colleagues ensuring that all risks are correctly identified and that subsequent work is designed and documented so as to effectively mitigate risk areas.
- Consistently able to contribute to the design of tests in order to meet audit objectives. Takes responsibility for meeting audit objectives so that revisiting site is not required.
- Able to communicate effectively with junior staff, explaining the purpose of specific testing.
- Able to review the work of juniors so that work undertaken is clearly and fully documented. To set an example whilst at client premises.
- Ability to interact with clients and client staff, showing consideration for the potential disruption to the client and their staff of audit site visits.
- Timely completion of write-ups relating to tests and work carried out. Taking responsibility for handing the audit file to the manager/supervisor so that basic amendments are not required.

## 5. Tax

- Preparation of accurate corporation tax returns and associated schedules.
- Full understanding of disallowable items to look out for and adding items back in advance of review.
- Full understanding of capital allowances in key areas, different rates applicable.
- Recognition of advantageous corporate tax reliefs and consideration of relevance of this to Wellers clients.
- Preparation and review of personal and partnership tax returns.
- Full understanding of the key personal tax rates in the UK and ability to explain the various tax bands and effect on tax liabilities both verbally and in writing.
- Identify basic tax planning opportunities and highlight these to management.
- Ability to confidently explain VAT rates, registration advantages and disadvantages and vat schemes.

## 6. Team participation and communication

### Internal

- Taking responsibility for ensuring you are fully briefed on the client and piece of work at the outset so that changes since your last assignment for the client have been communicated.
- Taking responsibility for checking your work plan in advance and discussing any issues with managers as they arise.
- Providing solutions where work scheduling may be tight and contributing to a better working environment for the whole team.
- Briefing more senior members of staff on the stage of completion of work set and ensuring junior staff are working to timetable.
- Pursue feedback from those reviewing your work in line with objectives set at your review.
- Attendance at client management meetings and participating in an active manner to the discussions.
- Ability to communicate with all team members in a professional manner.
- Acting on initiative in a manner that supports the team in the best way possible.

## **External**

- Discussing accounting queries with the client to ensure that manager discussions centre around tax planning etc rather than straightforward accounting items.
- Competently dealing with more complex matters than those covered at trainee level with H M Revenue & Customs, Companies House, accounting and tax advice lines, and other bodies over the phone on behalf of clients.
- Drafting of correspondence and company secretarial work. Showing an ability to explain more complex matters to clients and external bodies.
- Attendance at meetings with clients alongside more senior colleagues and contributing to the discussions.
- Meeting clients to discuss various matters whereby manager input is not required.
- Ability to develop strong relationships whereby you begin to develop a portfolio of clients where you are the main point of contact for day to day queries.

## **Development of Wellers and your role**

- Understanding of the Wellers Business Oxygen position and promoting this wherever possible.
- Ability to show initiative and take responsibility for delivery of an excellent service to clients.
- Show a desire to be promoted to the next level and showing the capability to be able to fulfil supervisor level responsibilities.
- Ability to develop strong relationships with clients.
- Consideration of introducing potential new clients, contacts and potential members of staff to the firm.
- Sitting in on new client meetings with a view to you being a key point of contact.
- Recognising and embracing the firms values.

### **General Requirements of the role**

- Display energy and enthusiasm for all aspects of the role, a willingness to assist others in any way possible and to take on new challenges.
- Demonstrate commercial awareness and ability to work to a budget using WIP to guide you on recovery rates on jobs.
- Time management – use your calendar and the available software to manage your to-do list and any tasks allocated to you and by you.
- Demonstrate an awareness of your chargeable and non-chargeable time and ensure non-chargeable time is minimal and / or beneficial to Wellers.
- Timely completion of your CCH timesheet to enable managers and partners to consider WIP.
- Completion of training records and objectives as required by your professional body every 6 months.
- Commitment to completing your professional qualification and obtaining high score passes.
- Being timely – ready to start work in accordance with the office opening time and setting a good example to junior staff.
- Meeting the required standards of personal presentation and appearance in order to be able to represent the firm.

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