



### **About the Company:**

Badger CPA was founded in 2014 to help entrepreneurs and businesses succeed. Our mission is to honor God by facilitating the financial success of business owners. Our vision is to be trusted advisors to the business owners we serve and to improve community by helping our clients grow and thrive.

Our Niche: Building the best accounting departments to improve quality of life for us and those we serve.

Our target market includes Growth-minded Business owners who:

1. Are companies with \$1M-\$25M annual revenue in specialized industries (Construction, Nonprofit, and Government Contractors)
2. Share our Core Values
3. Have a high business acumen and a no jerk policy
4. Need outsourced accounting, tax compliance & planning, QB/QBO & Unanet implementations, payroll, and search for CFOs/Controllers

Our core values are:

1. PEOPLE FIRST Family focus, winsome and caring for others.
2. HUMILITY Admit when we are wrong, quick to listen and slow to speak, learning from others.
3. OWNERSHIP Responsible for actions, follow through on commitments, high accountability culture.
4. RESULTS MATTER Commitment to excellence, continuous improvement, celebrating wins!
5. HUSTLE Growth oriented, hungry, going above and beyond.

**Position Title:** Assistant Controller  
**Reports To:** Controller  
**Classification:** Exempt

### **Key Functions:**

1. Training/Supervising Team
2. Project/High Level Work
3. Quality Control
4. Budget/Utilization of Team
5. Process Improvement

**Measuring Success:**

- Accuracy of Work
- Timeliness of Work/Meeting Deadlines
- Utilization
- Efficiency/Speed
- Training/Guiding team members
- Learning to lead client meetings and manage client relationships
- Working Independently

**Job Competencies:**

- Acceptance of firm core values (People First, Humility, Ownership, Results Matter, and Hustle)
- Demonstrates a solid understanding of GAAP accounting and critically analyzes increasingly complex accounting issues
- Assists others in understanding developing GAAP accounting issues
- Understands client businesses and industries, and identifies GAAP accounting solutions
- Demonstrates an understanding of sophisticated GAAP accounting topics and the ability to apply knowledge and skill-set to GAAP accounting compliance engagements and other special projects
- Researches GAAP accounting issues and effectively communicates conclusions in writing and verbally internally and externally
- Demonstrates growing competency in a specific subject matter and/or industry
- Serves as an internal resource to engagement executives with respect to special projects, where applicable
- Ensures that deliverables are substantially accurate and complete, and that proper documentation is retained in the file
- Consistently analyzes the need for additional documentation to support reports
- Displays master of Excel and effectively uses other firm- supplied technology to improve methods and personal productivity
- Demonstrates mastery of firm accounting software and technology resources, and educates and assists staff in use of available tools



- Willingly and effectively delegates responsibilities yet monitors progress of work of others and identifies when assistance is needed
- Communicates effectively with engagement executives regarding individual workflow and assigned engagements
- Seeks to meet client expectations and communicates challenges or opportunities to engagement executives; communicates effectively to manage client expectations
- Consistently reviews work product, prior to submitting for engagement executive review
- Effectively schedules assigned engagements on a timely basis and assists in solving scheduling conflicts
- Efficiently manages overall workflow and specific GAAP accounting engagements to avoid unnecessary budget variances; identifies and executes improvements to the firm workflow process
- Connects Badger CPA resources with client needs by identifying and relaying those needs to engagement executive, also demonstrates an understanding of the entire client service relationship
- Models strong analytical abilities
- Identifies problems, determines possible causes, and implements logical solutions
- Addresses issues that arise and thinks from the client's perspective
- Identifies opportunities to develop innovative solutions to bring to the client or to improve project performance
- Trains staff in assigned areas and serves as an internal resource to new in-charges and less experienced staff
- Develops others through appropriate delegation of procedures and responsibilities
- Provides timely, meaningful, substantive performance feedback that team members can understand and act on, and documents feedback in project evaluations
- Knows office and firm goals and understands the big picture
- Involves applicable coach or engagement executive in personnel issues, as appropriate
- Develops contacts through involvement in professional or civic community organizations
- Demonstrates a solid understanding of Badger CPA services and is alert to marketing leads within the client base



- Performs year-round communication and business development with clients

**Education:**

Four-year degree required

**Requirements:**

- Intermediate to advanced experience in GAAP accounting and review, as well as strong problem resolution skills; requires supervisory experience.
- CPA or CMA Required (or 5+ yrs. relevant exp)
- 40 hours/year relevant training

**Physical Requirements:**

- Consistently sit for four or more hours per day performing various tasks
- Constantly uses fingers and hands when typing, using 10-key, telephone, tools, or other equipment
- Frequently lift, transfer, push or pull up to 15 lbs. of files, boxes, or other small office equipment
- Hear average or normal conversations and receives ordinary information through verbal communications
- Use average, ordinary visual acuity necessary to utilize the computer or other office machinery and to read or write instruction manuals or other documents
- Frequently move about the office which may include climbing stairs, stopping, kneeling, and/or bending
- May travel to attend events or to attend other business activities

**Working Conditions:**

- The work setting is a hybrid home office and traditional office environment located inside a building with no hazardous or significantly unpleasant conditions
- Conceptual/Intellectual Activities and Requirements:
  - Frequently convey detailed or important instructions or ideas accurately, clearly, and quickly
  - Understand, remember, follow, and exchange complex instructions, information, and guidelines.
  - Organize thoughts and ideas into understandable terminology



- Ability to apply common sense reasoning and decision-making to carry out detailed, involved financial transactions, and to resolve problems involving several concrete variables
- Dependable attendance and punctuality are necessary to perform the essential job duties
- Willingness to participate in training and development opportunities to improve job knowledge of company policies, procedures, and services
- Available to work occasional long hours when necessary to reach goals. Including evenings and weekends as required

***This job description in no way states or implies that these are the only duties to be performed by the employee in this position. Requirements are representative of minimum levels of knowledge, skills, and/or abilities. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Additionally, this document does not create an employment contract, implied or otherwise.***