

**AVISAR™**

**CHARTERED  
PROFESSIONAL  
ACCOUNTANTS**



# Opportunity Profile

SENIOR ACCOUNTING MANAGER  
AVISAR CPA

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NELSON/KRAFT  
AND ASSOCIATES

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# WHY US?

## **Work/Life Balance**

As much as we love our work, it's not our life. We work a 37.5 hour week, and our team starts with three weeks vacation in their first year along with 11 paid stat holidays, and five paid sick/flex days to deal with unexpected events.

## **Compensation and Benefits**

When you join the team, you'll get full health & dental, life, travel, and AD&D insurance. On top of your salary, we also offer profit sharing bonuses tied to company success, and bonuses for client and staff referrals.

## **Fun Environment**

We genuinely like our co-workers and their families. We host regular team functions like our epic after-tax season celebration, our annual holiday party, summer BBQs, milestone celebrations, office potlucks, and random treat days.

## **Your Success**

We focus on your success. Every position has a set of core competencies to provide clear expectations of how to succeed. Every team member has a development plan and meets to discuss progress regularly. We offer a mentorship program and Professional Development days to help keep your skills current.



# EXECUTIVE SUMMARY

Avisar Chartered Professional Accountants is looking for an accomplished CPA with management abilities to join their team as a Senior Accounting Manager. Avisar's Senior Managers are responsible for leading and expanding an area of the practice, building the business, leading the team, and working closely with the Partners to strategize, plan, and execute on client and firm deliverables.

Senior Managers provide public accounting, assurance, tax and advisory services to Avisar's clients with a keen focus on building trusting long-term relationships with clients and contacts. Our Senior Managers take primary responsibility for assigned client accounts, including the intake, prompt completion and billing of their engagements and ensure that Avisar's Client Service Standards are met or exceeded wherever possible. Avisar's Senior Managers are responsible for providing a depth of expertise to Avisar's clients that combines financial reporting knowledge and public accounting experience for all of Avisar's service areas. Senior Managers are expected to provide proactive advice to clients from a management perspective based on their knowledge in accounting and financial reporting processes. Senior Managers are expected to keep abreast of new or evolving accounting or tax standards as they are relevant to the clients of the firm.

If you are an experienced CPA with leadership abilities and a passion for excellence, we would love to connect.





# OUR STORY

Avisar's trusted team of Chartered Professional Accountants provides a 'beyond the numbers' approach to problems and questions, working in-detail without losing perspective on the big picture as it relates to our clients' needs, business, and industry.

As with our clients, we offer our employees a better option. Our respectful, family-like team is passionate about making a difference within our community by building positive relationships and improving the lives of our team. We are proud to have built a positive environment where people can grow, support each other, and be supported, where the challenges are within the work itself, not the work environment.

As a result, we have had the pleasure of working with the majority of our employees for many years. We enjoy working together, learning from each other, developing our skills, and supporting each other through the challenges that come with being in public practice. Avisar is built on a culture of constant improvement where we are continually refining our processes for efficiency to ensure we are providing excellent client service.

Our employees are the heart of our business and we are committed to a healthy work-life balance. We encourage our team to rest and recharge after particularly busy seasons of work while supporting them with the tools and resources they need to thrive.



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## CORE VALUES

### **Meaningful Relationships**

We are passionate about developing meaningful relationships in the workplace and in our community.

### **Mutual Respect**

We operate with integrity and conduct business ethically, and work with clients who do the same.

### **Collaboration**

We foster a culture of genuine care among our staff and work together to achieve our goals and those of our clients.

### **Empowering Leadership**

We create an environment where team members are encouraged to be their best selves and realize their professional aspirations.

### **Continuous Improvement**

We are always improving our skills and expertise so that we can bring better solutions to our clients.

# KEY RESPONSIBILITIES

Senior Managers' responsibilities include, but are not limited to:

## Developing the business

- Work closely with the Leadership team to maximize the performance of the firm as a whole and contribute to reaching firm goals.
- Contribute to strategic and operational planning related to client and practice management, as well as the development of new ideas and approaches to improve work processes.
- Embrace continual personal and professional development to build and maximize the firm's services.
- Generate new business opportunities by promoting the firm's expertise and services, as well as developing ideas and solutions.
- Network in the local business community, consider business development opportunities and contribute to the preparation and delivery of competitive proposals to meet client needs.



## Leading the team

- Direct, supervise and oversee the work of accounting staff on client projects, including delegation to managers or other team members where appropriate.
- Review the work of junior staff and assist in their career development through constructive feedback, guidance and mentorship.
- Set priorities, plans, and schedules workload within broad guidelines and timeframes based on seasonal client workflow and deadlines.
- Manage relationships by accurately identifying and responding to preferred work styles, strengths, and personality traits.
- Strong focus on quality management, mentoring, and technical training of accounting staff to build their skills, capabilities, and confidence.
- Mentor, motivate and coach team members towards professional and personal development by setting clear expectations, providing feedback and conducting performance reviews.



## Planning and executing client deliverables

- Manage a portfolio of clients while understanding their business, key risks, and ways to deliver added value; ensure clients' needs are met and that relationships and accounts grow and develop.



- Strategize, plan, and execute the delivery of compilation, assurance, tax, and advisory client engagements including information intake, engagement planning, personnel allocation, budgeting and billing, supervision of file preparation, file review, deadline management and leading client meetings.
- Maintain a thorough working knowledge and application of relevant professional standards, emerging laws and regulations, and corporate governance requirements.
- Compliance with federal, provincial, and local tax laws and regulations.
- Utilize strong interpersonal skill set to establish and build strong client relationships.
- Provide consistent, clear, and timely communication to stakeholders regarding changing risk and scope of client engagements.



### **Continuous learning**

- Actively participate in external and internal educational seminars and maintain current knowledge of Avisar's policies and procedures as they relate to this position.
- Maintain appropriate professional designations and up-to-date knowledge of current information technology techniques.
- In conjunction with Avisar's Core Competencies, identify personal training needs and communicate/co-ordinate all such needs.
- Actively pursue the goals set in their Professional Development Plan.



# QUALIFICATIONS

Senior Managers' knowledge, skills and personal qualities include, but are not limited to:

- Chartered Professional Accountant (CPA) designation.
- At least 7 years' full cycle accounting with a public accounting firm, preferably working with medium-sized owner-managed profit-oriented clients.
- Advanced working knowledge and experience working with Canadian Accounting Standards for Private Enterprises (ASPE) and Canadian Accounting Standards for Not-For-Profit Organizations (ASNPO) and related technical literature.
- Completion of the CPA In-Depth Tax Course or other tax training (not a requirement, but preferred).
- Extensive understanding of business, accounting, management, and practice development principles.
- Strong strategic planning and conceptual thinking skills.
- Viewed by peers as a trusted advisor with a history of providing more than just basic accounting or tax services.
- Demonstrates an entrepreneurial, enterprising, curious, and ambitious spirit that thrives in all kinds of environments.
- Understands the concepts of how technology works and encourages the utilization of technology for the purpose of enhancing productivity and efficiency, where appropriate.
- Positively supports and demonstrates openness to new ideas and flexibility to change direction when appropriate. Within job scope, responsible for identifying ways to improve efficiency and results by exploring new possibilities.

# QUALIFICATIONS CONTINUED

- Self-starting individual who demonstrates self-motivation to achieve goals, and who seeks and seizes opportunities.
- Proven people management, relationship building, and leadership skills.
- Actively contributes to a positive and respectful work environment that promotes team and corporate success and overall positive morale. Works cooperatively with others to achieve shared objectives, responds promptly to others' needs, and demonstrates leadership when appropriate.
- Contributes to meetings and group efforts. Shares skills and knowledge with others, seeks to learn from others, and recognizes and supports the successes of other team members. Improves the organization by sharing ideas and opinions, and enhancing communication in all directions and across all levels.
- Respects the importance of attendance, punctuality and accurate timekeeping, and the impact it has on the rest of the team.

Every employee is expected to meet the standards of Avisar and the accounting profession. These standards ensure all employees provide high quality work that embodies the leadership, values, and ethics required to service Avisar clients. Senior Management supports initiatives that contribute to best practices and understands that success depends on the support of our employees in all areas of operations. Our employees are recognized for their support and contribution toward maintaining the high standards that Avisar values.

# SEARCH PROCESS

## OUR SEARCH TEAM



**MARK KRAFT**  
LEADING THE SEARCH

mark@nelsonandkraft.com  
778.982.4427

Mark is a trusted and sought-after executive search leader, with over 20 years of combined experience in the public and private sectors. Bringing a deep level of care and commitment to his clients, Mark has successfully led over 100 executive talent searches across Canada, for roles ranging from CEO to CFO, to COO. With his breadth and depth of experience, Mark has become a respected advisor and go-to expert for our clients looking to source top executive talent.



**JEFF PITCHFORD**  
SUPPORTING THE SEARCH

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647.409.2922

Jeff is an accomplished Senior Executive, with over 25 years of leadership experience across the chemical manufacturing and food processing industries. He wears many hats including Business Consultant, Executive Coach, Board Member, Forum Chair and Birkman Certified Professional. Jeff specializes in leadership development and team-based business success. He is passionate about developing leaders and building high performance teams.



**LARRY NELSON**  
SUPPORTING THE SEARCH

larry@nelsonandkraft.com  
778.385.0117

Larry is a Chartered Professional Accountant and former CEO of the Baptist Housing Society in BC. He has served on many charity boards nationally and provincially including the board of the Canadian Council of Christian Charities. He has placed over 80 senior executives and worked with more than 50 not-for-profit organizations across Canada. He is passionate about lending his professional expertise to our clients.

# ESTIMATED SEARCH TIMELINE

While every search is dynamic and time frames are hard to predict, the following is an overview of the expected timeline for this search:

**Location:** Hybrid (Langley, BC)

**Application Deadline:** Extended until a suitable candidate is found

**Start Date:** ASAP

## HOW TO APPLY

**Please forward a PDF of your resume to [info@nelsonandkraft.com](mailto:info@nelsonandkraft.com).**

Nelson/Kraft & Associates Inc. is an executive consulting firm that specializes in working with not-for-profits and for-profit businesses across Canada, assisting them in the placement of senior executives and directors.

Nelson/Kraft & Associates Inc. welcomes and encourages all interested applicants to apply for this position and is committed to the principles of diversity and inclusion in its hiring practices, and will only make distinctions among interested applicants in accordance with the applicable Human Rights legislation.

Nelson/Kraft & Associates Inc. also welcomes and encourages applications from candidates with disabilities. Accommodations are available on request for candidates taking part in the selection process. If you require disability-related accommodation during the recruitment process, please contact us.