



richardson swift

Job Title	Client Adviser
Location	Bath
Reporting To	Associate Directors and Directors
Key Relationships	Accounts, Payroll, Tax, Audit, Admin departments
Job Purpose	
Client Advisers are responsible for overseeing the accounting, business services and tax needs for a variety of non-audit incorporated clients and unincorporated businesses. The key skill of a client advisor is to communicate with their clients on a regular basis and highlight opportunities where the client may need more services or advice. There is also a strong focus on project work for clients, ranging from detailed financial forecasting, valuations, review of accounting systems, and conversion of systems onto cloud accounting. Your role will be to proactively manage a client portfolio to complete timely accounts assignments within budget and develop opportunities for creating new business from those clients. You will work with a team of staff to always ensure the highest possible standards of client service and to take an active role in the growth of the office through identification of opportunities and development of trainees within the team. Ideally, the successful candidate will be qualified either as ACA or ACCA and be able to demonstrate good experience in a wide range of accounting skills and financial reporting.	
Job Role	
• Lead the planning and delivery of accounts assignments for a portfolio of clients and specialist assignments, coordinating all relevant input to meet client needs, compliance standards and budget. • Ensure the Partner is made aware of any potential overruns with recommendations to justify and obtain additional fees and assist the tax experts by highlighting any possible issues. • Ensure that jobs are completed to the highest standard, within the agreed internal budget for the job and to discuss all material points arising on the assignment with the manager/director and client. • Assist with review and completion procedures on statutory accounts, management accounts and VAT returns, liaising with the client/director where required to ensure successful completion. • Assist with tax compliance, corporation tax computations and general VAT issues. • Build and maintain consultative client relationships and to always practice the principles of excellent client service. • Ensure that appropriate liaison takes place with all other departments, and that all potential client needs are identified and serviced accordingly. • To take the lead role with project assignments, visiting clients to ascertain needs and delivering the project in a cost-effective manner. • To provide close support to others in the team, providing answers to clients or other team members on technical issues and accounting processes • To maintain an advanced level of technical knowledge through appropriate reading and courses, and to fulfil any development or training requirements. • To support the training and development of the staff within the team • Regular business development and cross selling to help the firm meet fee growth targets.	
Person Specification	
You will need to come from an accounting practice background, ideally having experienced a wide range of exposure to differing accounting areas. You will have an understanding of the requirements the role demands within an accountancy practice. • A good understanding of UK financial reporting requirements and good confidence in accounts preparation • Ability to produce/process complex management accounts and forecasts. • Excellent IT skills, experience with Xero/Cloud Accounting would be advantageous. • Ability to demonstrate commercial awareness and to add value. • Strong oral and written communication skills • Well organised, enthusiastic and self-motivated team player you will have a thorough and systematic	

approach to work.

- Ability to work independently and to manage own workload.
- Well-developed people skills to relate to clients and colleagues.
- Good organisational and time management skills.
- Strong accounts production skills.
- At least 2-3 years post qualification experience within a business services environment or able to demonstrate equivalent knowledge, experience and competency has been gained.

What's in it for you

- Competitive salary
- Annual salary review
- 25 days holiday plus Bank Holidays
- Hours 37.5 per week full time
- Birthday day off
- CPD support
- Life Assurance (4x Salary)
- Personal Pension
- Cycle to work scheme.
- Join a busy and friendly team in the heart of Bath