



## Strategic Financial Client Advisor

Do you have a passion for the fitness community, thrive when you're helping businesses grow, and excel at providing insight to business owners making critical decisions?

This position is not for everyone. We are an entirely virtual public accounting firm experiencing sizable growth of which you have the opportunity to be an instrumental part. We work odd hours and on tight deadlines, respond quickly to client requests, are agile in our approach, and navigate through difficult client situations. The fitness industry is full of successes, but also failures as 80% of businesses fail within the first 5 years. This makes us uniquely positioned to help reduce that fail rate while helping other locations excel in their profitability.

At The Fitness CPA we leverage cloud based platforms and test new technologies to optimize our workflow which means the software you learned last month may be replaced with something that may or may not work as well as we search for the best solution to effectively and efficiently provide value to our clients. Our public accounting firm provides outsourced CFO, accounting, payroll and tax services to the fitness industry.

With oversight from our firm founder, you will provide fractional CFO and advisory services directly to our clients based upon financial data provided by our team of senior staff accountant CPAs. Occasionally, you will need to roll up your sleeves and assist staff complete transactional financial work. This entirely remote position is a full-time, telecommuting role. As such, the ability to communicate clearly via video, email and telephone is critical.

### Job Responsibilities

- Manage Accounting Associates' month-end client reports to verify the highest quality of work is being delivered to clients including for punctuality, completeness and accuracy.
- Manage Accounting Associates' month-end process to ensure client reports are delivered by the 15th of the month. This includes assisting in client communication and problem-solving to move the process along, when needed.
- Be a resource to accounting associate staff by answering questions and helping to solve accounting issues.
- Review and prepare adjusting journal entries.
- Prepare outlines and lead all Monthly and Quarterly Strategy Calls with clients.
- Assist in timely and courteously answering client questions via email and video; meeting virtually with our clients.
- Interacts with customers and resolves customer complaints, relays relevant comments from customers to manager.





### **Job Responsibilities continued...**

- Represent the company in a courteous, efficient and friendly manner in all customer and employee interactions to ensure customer satisfaction.
- Handle multiple special accounting related projects simultaneously.
- Work with the firm founder and other staff in leading the client onboarding experience.
- Lead exceptional client onboarding experience, hold staff accountable for milestones, initial oversight provided by firm founder.
- Encourage and promote a company culture that is consistent with our core values and mission statement.

### **Attributes**

- CPA designation required
- 6+ Years of public accounting experience.
- Success in virtual environment
- A dedicated, secure and quiet room to work from home with no interruptions to conduct video calls.
- Have a strong, consistent internet connection.
- Ability to manage stress and demands of tax season while meeting deadlines of various client and firm demands.
- Self assured, capable, comfortable and adept in both written and video client communication to clearly and effectively to explain financial and tax-related technical issues to fitness owners.
- Ability to compile and translate often complicated financial data into terms clients can understand so they can make better business decisions for themselves and their stakeholders.
- Exceptional interpersonal skills and client interaction.
- Excellent verbal, written and video communication skills.
- Proactively communicate with each client, staff and the firm founder.
- Ability to multitask to manage multiple clients simultaneously.
- Self starter - able to identify work that needs to be done and do it without being instructed to do so.
- Ability to work independently, be self-directed, and motivated.
- Desire to learn, seek new challenges and take on additional responsibilities.
- High degree of confidentiality.
- Proficiency with technology including Microsoft suite, gmail, zoom, Xero, QuickBooks, Dropbox, Payroll Relief, Practice Ignition are all pluses. Must have ability to quickly learn new platforms.





### **The Fitness CPA Offers:**

- Before, during and after COVID19 we understood the work environment is changing and the paramount importance of our team members responsibilities outside of work. Don't believe us? Ask our team. We support and are flexible to your and your family's needs provided your work responsibilities are met timely, efficiently, and with excellence. If you struggle completing tasks on your own and exceeding our expectations, this role is not for you.
- No commute – work from home!
- Flexible work schedule
- Competitive salary/incentive package.
- Consistent annual growth with 14 years in business
- Ongoing training
- Required 21 PTO days off per year fully disconnected from work platforms, client expectations, and team communications including at least one full 9 day period (a weekend, week, and weekend)
- FCPA provides your workstation and related electronics, reimburses \$100/month for cell phone and internet.

