



CREATIVE PLANNING

Title: **Audit Manager - GASB**
Location: Any Location/Hybrid/Remote

OVERVIEW

BerganKDV recently joined Creative Planning, a top tier wealth management firm that provides investment management services and full comprehensive financial planning in-house. Creative addresses all aspects of financial planning from estate planning, tax strategy and risk management to retirement, education, charitable planning, and business advisory – using all in-house specialists. This is a unique opportunity to join a top tier firm paving the way for unparalleled client and team member experiences.

JOB SUMMARY

The GASB Audit Manager plays an integral role in the successful completion of client attest engagements, team development, and business process improvement. The GASB Audit Manager will be responsible for helping to manage Government client engagements and relationships through an interactive approach to discovering clients' attest needs. They will apply technical knowledge to solve client issues and improve their external audit experience..

JOB DUTIES

- Proactively engage with clients to meet their attest needs and provide insight and advise on business and internal control improvements
- Assign work to staff members on the basis of their knowledge and capabilities.
- Manage interns, Audit Staff/ Seniors/ Supervisors to provide feedback, evaluate their progress, and offer guidance and direction.
- Make sure all work assigned is completed on a timely basis within predetermined budgets.
- Contribute to staff performance reviews.
- Effectively communicate all aspects of work performed to clients and the broader GASB team.
- Enhance existing client relationships and actively seek to develop new relationships with potential clients and referral sources that would be beneficial to the firm.
- Attend and participate in weekly team meetings, as well as periodic committee meetings as assigned.
- Recognize opportunities to provide additional services to existing clients.
- Manage all elements of their client book including: management of WIP and budgets on engagements, billing, scheduling client meetings, and client engagement.

REQUIRED EXPERIENCE / QUALIFICATIONS

- Candidate must be an active CPA and have a strong accounting background
- Bachelor's degree in accounting or other related field
- Minimum of 5 years' experience in public accounting and auditing with a thorough knowledge of professional accounting and auditing standards
- Proven supervisory experience
- Strong analytical and problem-solving skills
- Exceptional oral and written communication skills

TECHNICAL SKILLS

- MS Office /Windows experience particularly financial modelling and data management in Excel
- Strong analytical and problem-solving abilities
- Excellent written and verbal communication skills

EXPLORE THE WORKPLACE OF THE FUTURE

Together, we are building the nation's preeminent wealth and business advisory practice, by providing a comprehensive suite of services that support and empower individuals, families, institutions and businesses. Our values drive our decisions, and our passion is putting our clients at the center of everything we do.

Creative Planning Differentiators:

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| • Day One Benefits Enrollment | • Comprehensive Benefits Package |
| • Growth Potential | • Customized Career Paths |
| • Close-Knit Collaborative Team | • Open Door Leadership Style |
| • Mentor Program | • Firm-wide Trips for All Team Members |
| • Employee Referral Rewards | • Creative Planning Cares |

BENEFITS THAT GO BEYOND

We are proud to offer a competitive and comprehensive benefits package, with options designed to help you make the best decisions for yourself, your family and your career. Our competitive compensation package is catered to reward you for your performance and recognize you for the value you bring to our business. In addition, our total package includes medical and dental coverage, matching 401(k) plans, PTO, observed holidays and a range of programs and benefits designed to support your physical, financial and social well-being.

Creative Planning is an equal opportunity employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

We will ensure that individuals with disabilities are provided reasonable accommodation to participate in the job application or interview process, to perform essential job functions, and to receive other benefits and privileges of employment. Please contact us to request accommodation.