



CREATIVE PLANNING

Title: **Audit Shareholder**
Location: Any Location/Hybrid

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. Creative Planning also assists clients with external business services such as payroll, technology support, and attest work to name a few. This is a unique opportunity to join a top tier firm paving the way for unparalleled client and team member experiences.

JOB SUMMARY

An Audit Shareholder will have deep and meaningful relationships within their local business community, will have a track record of developing new business, and leveraging trusted relationships. As an Audit Shareholder, you will have an important role in developing, mentoring, and coaching our people to achieve challenging and rewarding careers and developing them into future leaders of our firm. With the support of the firm, you'll have the opportunity to develop and pursue creative approaches to resolve client issues.

An Audit Shareholder provides high quality attest services to external clients, executes on engagement scheduling, and is an active participant in identifying areas of process improvement while being a leader in the firm's CPA Services Department. The Audit Shareholder plans, supervises, and performs final reviews of engagements while ensuring our clients experience excellent service through their deep technical knowledge and advanced business development skills.

JOB DUTIES

- Be seen as a trusted advisor, manage a book of business, and improve client loyalty
- Ensure team is adopting and implementing firmwide standards
- Possess sound technical GAAP skills to lead assurance engagements
- Identify new ways to deliver exceptional audits
- Train and mentor managers and staff and provide timely feedback
- Plan, supervise, and perform final review of all engagements
- Communicate with all levels within the client's organization, both orally and in writing, and present financial information to the clients governing body
- Accurately scope new projects and construct a fee estimate/budget that considers appropriate margins for the practice and the overall picture of the client relationship
- Clearly identify client expectations at the beginning of the engagement
- Identify areas of risk on an engagement, develops and enacts plans to manage those risks
- Ensure they and their teams comply with all applicable laws, regulations, and firm policy/procedures in their work
- Generate meaningful revenue for the practice through expanding existing relationships and building new relationships

- Provide clear and timely instruction, leading to efficient production and limited need for rework
- Performs various technical accounting research and consulting projects
- Performs billing functions
- Effectively manage multiple deadlines
- Actively participate in firmwide A&A L10 and related committees/teams

REQUIRED EXPERIENCE / QUALIFICATIONS

- Candidate must be an active CPA and have a strong accounting background
- Bachelor's degree in accounting
- 10+ years of public accounting audit experience
- 3+ years of experience at a National Firm, preferred
- Experience, ability, and desire to lead others or manage a team
- Strong technical audit ability
- PC literate: basic software applications: Word, Excel, Internet, PowerPoint, etc.

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.

Creative Planning, LLC is an independent wealth management firm, whose affiliates also provide business consulting, tax, financial, and other professional services to clients. Creative Planning and its affiliates lease employees and other resources to BerganKDV, an independent, separately governed, and licensed CPA firm, in support of audit and attest services BerganKDV provides to its clients.