



CREATIVE PLANNING

Title: **Audit Director**
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.

We do not accept resume submissions from third party recruiters or staffing agencies. Please contact our talent team directly.

JOB SUMMARY

The BerganKDV Audit Director provides excellent audit preparation services in all client engagements, 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 Director 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

- Develop and execute a networking strategy to meet new prospects and maintain an industry focus
- Communicates with all levels within the client's organization and presents financial information to the client's governing body
- Accepts audit project assignments as necessary and communicates project progress with partners
- Performs various technical accounting research and consulting projects
- Maintains current knowledge on accounting standards and provides training to team members
- Achieves department goals for chargeable and total hours
- Completes job performance evaluations and team member annual reviews
- Performs billing functions
- Attends and participates in related weekly/monthly meetings
- Effectively manage multiple deadlines

REQUIRED EXPERIENCE / QUALIFICATIONS

- 12+ years of audit experience
- A bachelor's degree in accounting or related degree
- CPA Certified
- Master's Degree in Tax or Finance strongly recommended
- PC literate: basic software applications: Word, Excel, Internet, etc.
- Experience leading or managing a team

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:

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