



Title: **Audit Supervisor (GASB)**

Location: Iowa/ Minnesota/ Nebraska/ Kansas

JOB SUMMARY

The Creative Planning Business Services **Audit Supervisor** works to provide excellent attest preparation, review, and ancillary services to audit clients as a member of BerganKDV*. The Audit Supervisor is a key leader in client engagements, balancing technical expertise with strong relationship management skills taking ownership of audit and accounting engagements, ensuring work exceeds client expectations, effectively manages risk, and reflects the highest standards of quality. The Audit Supervisor actively participates in firm initiatives, seeks opportunities for professional growth, and provides mentorship to others. They are responsible for supervising Associates and Senior Associates on engagements, guiding their development while ensuring timely and accurate deliverables. They work closely with client finance teams and serves as a vital communication link between clients, associates, and managers—helping to align expectations, cascade key messages, and build long-term trust.

JOB DUTIES

- Plans, supervises, and reviews all levels of engagements.
- Applies and maintains advanced accounting standards and education.
- Effectively follows instruction and meets time budgets and deadlines for assigned areas, projects, and overall assignments by utilizing available associates.
- Develops recommendations that reflect an understanding of client's expectations, industry and business (e.g. goals, key success factors, strategy for competition) while adhering to client confidentiality standards.
- Conducts technical research to substantiate, challenge, or remedy client position related to accounting, auditing, tax, or industry issues.
- Builds authentic relationships with clients through all interactions. Works to identify areas where Creative Planning can further their business goals.
- Actively seeks opportunities to join business development meetings with the goal to build strong relationships and drive new client projects and revenue.
- Explore industry specialization and industry focused service. This may include attending peer group meetings or industry organization involvement.
- Be a resource for other members of the audit team. This may include technical training and providing feedback on client engagements.
- Support the growth and professional development of yourself and your teammates by participating in company sponsored trainings, CPE courses, internal committees, and mentorship opportunities.
- Actively participates in firmwide meetings, committees and teams.
- Model Creative Planning values.

ATTEST PRACTICE AREAS

The attest practice encompasses four specialized areas of expertise. Each area may call for additional training, unique skill sets, or prior experience to be successful in the role.

- For-Profit Businesses

- **Governmental Organizations**
- Not-For-Profit Organizations
- Forensics

REQUIRED EXPERIENCE / QUALIFICATIONS

- 4+ years of audit experience including a strong track record of working with closely held business entities
- A bachelor's degree in accounting or related degree
- CPA Certification preferred

TECHNICAL SKILLS

- Risk assessment and analysis
- Research and understand professional frameworks, standards, and guidance
- Exceptional analytical, teamwork, and organizational skills
- Detail oriented
- Quality control
- Proficient in Microsoft Office Suite
- Familiarity with audit software, project management tools, and emerging technologies
- Excellent written and verbal communication skills
- Integrity, dependability, a positive attitude and a strong work ethic

**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.*