



# CREATIVE PLANNING

Title: **Audit Staff**  
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 Audit Staff works to provide excellent audit preparation service in our FASB engagements, participating in engagement scheduling, and is an active participant in identifying areas of process improvement. The Audit Staff is responsible for executing the audit plan as developed by the Partner and manage. They will be a contributing member and future leader of audit engagements and the broader audit team. The Audit Staff will perform test work, handle projects as assigned, and allow the audit team to provide input on client financial statements, while fostering strong client relationships.

## JOB DUTIES

- Prepares basic and advanced work papers, including clear and concise written documentation; drafts reports including footnotes and management and required communication letters.
- Keeps current on and applies basic accounting standards and education.
- Effectively follows instruction and meets time budgets and deadlines for assigned areas, projects and overall assignments.
- Understands and adheres to client confidentiality standards, demonstrating awareness of firm's risk management policies and procedures, by identifying and referring ethical, independence and conflict issues to manager and/or partner.
- Develops open and cordial oral and written communication with appropriate client personnel to facilitate good relations and exceptional client service, communicating with all levels within the client's organization, both orally and in writing.
- Develops strong understanding of client's business to identify issues and provide constructive service suggestions.
- Develops understanding of service offerings within, and across lines of service to identify opportunities to meet client's needs.
- Be a resource for audit associates and interns. This may include technical training and providing feedback on client engagements.
- Support the growth and professional development of yourself and your Creative Planning teammates by participating in company sponsored trainings, CPE courses, internal committees, and mentorship opportunities.

- Actively participates in firmwide A&A L10 and related committees and teams.

## **REQUIRED EXPERIENCE / QUALIFICATIONS**

- A bachelor's degree in accounting or related field of study
- CPA certification in process preferred
- 1+ years of professional services experience with non-profits or passion for working with nonprofits preferred
- Excellent interpersonal skills
- Strong written and verbal communication skills
- Strong analytical, teamwork and organizational skills
- Integrity, maturity, dependability, a positive attitude and a strong work ethic
- PC proficiency, including spreadsheet, word processing and presentation software applications
- Analytical skills with high detail orientation

## **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.