

Bookkeeper/Financial Coach

OVERVIEW

Are you an experienced Accountant and/or Bookkeeper looking for a great place to work that offers a flexible work schedule and is 100% remote? Then keep reading because this might be a great opportunity for you!

We seek a highly organized and knowledgeable Bookkeeper/Financial Coach to provide our clients with professional, timely, personalized accounting/bookkeeping support. As a part-time W2 employee, you will work remotely, managing assigned client accounts and providing expertise in financial education/coaching while maintaining communication between our leadership team and clients.

ABOUT US

- Our clients are service-based companies that rely on us to manage their weekly bookkeeping, including but not limited to A/R, A/P, payroll, monthly financial statements, etc.
- Most of our clients follow the Profit First method of cash management. We are a mastery-level certified firm
- We rely heavily on technology and use multiple online platforms to manage the work internally and externally. With this, we are always looking for ways to streamline the work and uplevel the client experience

ABOUT YOU

- You are seeking a professional “home” where all of your years of accounting experience will be valued
- You enjoy helping entrepreneurs know their numbers
- It is in your DNA to teach and support others to achieve greatness
- Demonstrates knowledge of general accounting principles, practices, and the basic application and use of concepts, theories, and terminology of accounting;
- Bonus: able to identify ways to increase client profitability and incorporate Profit First
- You are curious and able to identify client behaviors based on financial activity
- Tech-savvy: you like to learn new things and apply them
- Highly conscientious and understands the impact of this role; professional and respectful of clients and team
- Thrives with structure, self-disciplined, dependable, reliable, detailed, thorough, conscientious, on time, follows directions and established systems

CORE RESPONSIBILITIES

- Communicate with clients to answer questions or provide/explain information
- Document, organize, and maintain client files while actively participating in client retention; focused on client profitability
- Maintains a financial pulse on the client's business, serving the client and beyond data analysis/entry
- Processes bookkeeping for each client weekly; reviews/analyzes data and creates monthly financial reports; maintains error-free accounts; ensures all business transactions are reasonable and appropriate;

Our values guide us in all we do....

VALUES

Honesty and Trust: We are honest to ourselves and to each other.

Kindness: Positive people are uplifting.

Professionalism: Integrity and reliability demonstrate that the work is important to us. We expect it to be important to our clients, as well.

Respect: We have regard for the feelings and opinions of others and assume the same in return.

Responsibility: Cultivate mutually beneficial relationships; taking ownership of our contribution is essential, good or bad.

PURPOSE

This position is integral in maintaining the efficiency and accuracy required in bookkeeping. The ideal candidate for this role is a self-starter who works autonomously while engaging with a remote team to accomplish the overall business goals. Resourceful and communicative with an ongoing drive to continually provide high-level support and eagerness to learn.

REPORTING

This position reports directly to the Finance Team Lead with a dotted line to the CEO

CONTINUING EDUCATION/RESEARCH

We strive to continually explore ways to improve our services and employ new and innovative strategies to enhance the client experience.

QUALIFICATIONS

- High School diploma; advanced degree preferred
- 5 to 7 years of recent experience in accounting/bookkeeping; experience managing multiple clients is preferred
- Profit First Certified preferred; must be willing to become certified through our membership if not currently certified
- Excellent written and oral communication, as well as interpersonal relationship skills, and embraces financial “coaching” approach and mindset
- Proficient use of QuickBooks Online and G-Suite
- + Bonus points for experience with Asana, Gusto, Bill, ShareFile or SmartVault, and more
- ++ Extra bonus points for experience with a reporting platform for SMBs
- Ability to analyze and explain financial statements
- Understands KPIs, metrics, and financial statements; ability to analyze information and effectively explain/educate clients
- Desire and ability to learn new platforms
- Ability to prioritize job responsibilities and meet deadlines
- Ability to follow proven systems while looking for improvements
- Works efficiently and effectively; excellent time management
- Proactive rather than reactive; seeks to understand and find solutions while educating clients

HARD SKILLS

Proficiency in Google Suite (Email, Calendar), Asana/Task Mgmt Systems, QuickBooks, Dubsado (or other CRM)

Experience in accounting and financial environments A MUST

Strong knowledge of financial statements and KPIs; ability to analyze data and effectively communicate information.

SOFT SKILLS

Excellent communication and interpersonal skills; Seeks to understand, empathetic, collaborative, and embraces humility

Strong problem-solving skills with a solution-based mindset

Exceptional organizational and multitasking abilities

Confidentiality, discretion, and professionalism are expected

Embraces change and seeks innovative ways to engage clients and support team members

Ability to anticipate needs while being adaptable, reliable, and resourceful

SALARY & BENEFITS

Part-Time: 10+ hours per week

20% Compensation rate based on monthly client retainers (Average range: \$40-\$200/hour depending upon accuracy/efficiency)

W2 Employee

Remote work arrangement with flexible hours

Opportunity to grow with the company and increase hours

Access to professional and career development opportunities

***US-based candidates only**

****No Agency Owners/1099/Freelance candidates**