



**CREATIVE
PLANNING**

Title: **Audit Manager**

Location: Overland Park, KS

JOB SUMMARY

The Creative Planning Audit Manager services audit clients as a member of BerganKDV*. The Audit Manager plays a key role in supervising audit engagements, ensuring technical excellence, on-time delivery, and strong client service. This position focuses on leading staff and seniors on audit compliance and advisory work, reviewing deliverables, resolving routine technical issues and identifying areas for process improvement while being a leader in the firm's audit department. The Audit Manager collaborates with the Audit Director and Managing Audit Director to ensure the seamless execution of firm goals in quality, client service, operational efficiency, growth, and culture.

JOB DUTIES

- Effectively manage client relationships and expectations throughout the engagement and beyond to maintain a high level of client retention for the Audit Director.
- Stay updated on new attest standards, ethical standards and industry best practices and mentor and train the team.
- Implement the firm's quality control policies in daily work and escalate concerns.
- Ensure firm compliance with professional standards, internal policies and regulatory requirements.
- Serve as a primary point of contact for routine client questions, coordinate timely responses and keep them informed of progress and deadlines.
- Develop a reputation with clients for reliability, responsiveness, and technical competence.
- Deliver a full range of attest services and effectively manage multiple deadlines.
- Engage in client discussions about strategic business topics, proactively recommend risk mitigation tactics and improvements.
- Collaborate with seniors and staff to lead, assign and supervise work to ensure client deliverables are accurate, timely, and meet expectations.
- Use audit software and tools effectively, and ensure staff compliance with processes.
- Monitor engagement budgets and highlight issues early.
- Demonstrate timeliness and complete knowledge of firm policies on financial matters: billing, accounts receivable, budgets, time reporting, engagement, and profitability.
- Support the growth and professional development of yourself and your teammates by participating in company sponsored trainings, CPE courses, internal committees, mentorship opportunities and collaborative reviews.
- Identify opportunities within new and existing client relationships.
- Model Creative Planning values.

- Provide and ensure open communication with all team members to promote a positive learning environment that focuses on trust, transparency, and accountability.

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

- Active CPA Certification
- 5+ 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

TECHNICAL SKILLS

- History of preparing and reviewing attest engagements while meeting quality standards
- Solid technical skills in a matter relevant to mid-market businesses
- 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.*