

COMPANY PROFILE

Dear applicant,

Thank you very much for visiting our company. We have developed a special overview to allow you to discover everything you need to know about us and about the specific job opening. Please read this document carefully before meeting with us for a first interview. We have assembled all the important data you would want to have, in order to make a proper evaluation of the opportunity offered by our company.

Company Description

Bey & Associates, CPA is one of DC's top small CPA firms servicing a strong base of entrepreneurial and professional clients in a wide range of industries. We provide services beyond our core services of accounting and tax preparation, including financial analysis, organizational consulting and advanced tax minimization strategies. As a result of our technologically advanced firm we are able to deliver services to clients across the country. The company was founded by Kim Bey, CPA. Formally acknowledged as one of the nation's most successful tax planners, Kim is DC's 1st Certified Tax Coach and a member of an elite group of fewer than 200 accountants nationwide that are dedicated to tax planning to save clients' money. She is an author and public speaker. She was featured in Washington Post as *the* expert in "Filing Taxes" article, and featured in Washington City Paper – DC's finest 2010, and a workshop speaker at Digital Capital Week (DC Week) in November 2011.

What differentiates Bey & Associates from other CPA firms is that we help clients to be proactive and give them concepts and help them implement strategies that leave more on their bottom line. Most accountants do a fine job recording the history you give them. They compile monthly, quarterly, and annual books and records. At tax time, they put the "right" numbers in the right boxes on the right forms. But then they call it a day. At Bey & Associates, we operate much deeper into our clients financial interests. We specialize in *minimizing* taxes for clients; this requires planning and strategic mindset. This is our definite competitive advantage and well founded reputation.

What Management Style Do We Use?

We are a small firm and we tend to suffer from our success. We have now reached a level of production that requires more standardization of our process and of our successful service formula. Our philosophic principle regarding management is simple: in order to grow, we must empower our best and most dedicated employees and view & treat them as partners. This suggests an open/transparent management style and a flexible approach to change and development. Creativity and initiative are two virtues which make up the blood of our daily life in managing and expanding our activities, for the purpose of always servicing our clients better, faster and above their expectations.

We measure production with on-the-job statistics; these are key factors to judge individual staff performance, and a rise in production is key to achieving any additional compensation or promotions. Declining production or production that levels off over a long period of time may become grounds for dismissal.

We reward our staff for bringing in new clients to the firm by paying 10% of our annual billings for that client for 2 years in addition to other performance bonuses.

Employment at Bey & Associates is "at-will" – see our employment-at-will agreement form. We require successful completion of a 90-day introductory period, which does not alter any staff member's status as an at-will employee. Any continuation of employment after the introductory period remains at-will.

Our motto is: ***“Helping Clients Keep More of What They Earned”***

Where are we going?

The company services clients in the Greater D.C. area and various states across the country and is currently facing the challenge of being able to respond to increasing demand from professionals and entrepreneurs who know the company’s reputation for saving its clients a lot of money. Our 3-year ambition is to more than double the current level of operations. This can easily happen under just a few conditions:

1. We need to structure our current organization to make it more fit for managing twice as many clients.
2. We need to optimally leverage our current competitive advantage.
3. And most importantly, we need a strong, reliable and committed Senior Accountant with *VP potential* individual who, short of starting his/her own business, is looking to develop a career more than taking a job.

What added value will you bring – and what’s in it for you?

Our reputation is our main asset. But we are aware that without a strong organizational support and a serious dedication to servicing every single client, we will not attain our growth objectives. This is where you come in play. Once you have passed the evaluation period, your Senior Accountant position with VP level potential will call for talent and dedication which can complement the owner’s expertise. Together we will generate amazing results.

For the accurate, reliable and strong producer, this position offers training on the most effective state of the art tax, accounting, practice management, and administrative systems, a flexible schedule based on client workloads and seasonal tax deadlines, with competitive compensation and potential for excellent bonuses. As the key CPA working closely with the owner, you will gain exposure to top tax planning and effective management consulting expertise. And most importantly, it offers a bright future if you are eager to develop high-value expertise in a unique group.

Job Title

Title of position: Senior Accountant with VP potential

Job Description:

- You will be reporting directly to the founder of the company and work closely with her.
- You will be working from our office located in Washington, DC (above Farragut West Metro Station) with partial telecommuting if desired
- Assist with preparation of quarterly tax planning worksheet which includes tax exposure for both entity and individual level and making recommendations for tax saving ideas. Training will be provided in this area.
- Supervision of associate tax preparer/accountant.
- Prepare corporation and individual tax returns – 1120, 1120S, 1065, 1040. This includes communicating with clients to obtain the necessary tax documents.
- Prepare monthly payroll for clients and quarterly payroll reports.

- Perform Quickbooks analysis and adjustments, quickbooks support, and financial statement preparation on monthly, quarterly or annual basis.
- Responding to government notices and clients' telephone and/or email inquiries.
- Monthly, quarterly or annual meetings with clients to discuss tax planning ideas, analysis of their financial statements and other business matters.
- Contribute to the company's expansion by helping acquire new, qualified clients.
- Taking on anything that you can that will save me time from handling billing disputes, consulting projects, and client inquiries to a variety of other tasks that save me time. In essence, you are willing to roll up your sleeves and help do whatever needs to be done so that we get the job done.

Ideal Candidate:

- CPA with 2 or more years of experience in public accounting
- Current public accounting firm experience
- Someone who enjoys working hard and finds satisfaction and pride in getting difficult jobs done quickly and accurately
- High communication level and the ability and desire to interact directly with highly successful entrepreneurial and professional type clients.
- Experience with tax return preparation – Corporate, partnerships and individuals
- Proficient with Quickbooks, at least 2 years experience
- Experience with Ultra Tax and the Creative Solutions suite of products including tax planner, depreciation, trial balance, accounting and file cabinet is a big plus.
- Someone who is a team player, service oriented, self-motivated, personable and well organized and who enjoy working directly in a diversified small business environment.
- No "9-to-5 type of employee" but rather entrepreneur-oriented, eager-to-grow type.
- The bottom-line is that I am looking for a long-term fit with a special person who can complement my skills and abilities. Together we'll generate amazing results. There are promotion opportunities available for the right person.

Dear applicant,

Thank you very much for reading this overview. We hope it answered all or most of your questions regarding our company and the job opening. If after reading this overview you believe the job opening fits with your qualifications, aspirations and career ambitions, we will be pleased to have a first interview with you. Please complete the Job Application and email it to kim@kimbeycpa.com. Don't hesitate to call us if you have questions about this position. However if, while reading this overview you realized that the proposed job does not fit with your expectations, we thank you for visiting us and we wish you the best success in your career development.

Best success,

Kim Bey, CPA
 President/CEO
kim@kimbeycpa.com
<http://www.linkedin.com/in/kimbeycpa>