

## ACCOUNT MANAGER

### Company Profile

Accounting For Good (AFG) has a mission to bring financial intelligence to non-profit organisations. We believe good financial decisions come from good financial information delivered through management reports which are meaningful, accurate and timely. These three characteristics - meaningful, accurate, timely - not only drive why we do what we do, but also how we work with our clients and what we think is important. Our team works hard to ensure non-profit Boards and managers get information which is understandable and meaningful, that the bookkeeping and accounting is professionally done to ensure accuracy, and that the information is provided in a timeframe which enables 'in time' decisions.

AFG has been providing financial management services to non-profits since 1997, previously as Matrix on Board Pty Ltd. We support our clients with financial management expertise so they can focus on delivering their organisation's mission. Our team works with small, medium and large organisations, supporting them to operate, report and plan effectively. We see ourselves as partners with our clients and take pride in providing high quality financial information to assist decision-making.

Accounting For Good is a Xero Advisor Certified Practice and our team includes Chartered Accountants, Certified Practising Accountants and Xero Certified accountants and bookkeepers ensuring that accounting and reporting are of the highest standard.

We value: **enthusiasm** for what we do and the work of our clients; respect and honesty in our **relationships**; a desire to **innovate** and continuously improve; and **reliability**, our work is accurate and on time. A successful Account Manager will be a skilled problem solver who is friendly, confident and knowledgeable. You will know a lot about accounting and a lot about non-profit organisations in Australia, and you are the kind of person that gets a kick out of supporting our non-profit clients to understand their financial performance and position and to plan for the future. You will delegate to our technical team and ensure we achieve client deadlines.

### Position Summary

The Account Manager is the key contact for a portfolio of clients - the go-to person for advice on technical and strategic financial matters, support with budgeting and audit and assistance with best practice finance processes. Onboarding of new clients and short term projects are also part of the Account Manager's remit.

Supported by the AFG accounting team, the Account Manager ensures that our clients have the financial information they need, when they need it. The Account Manager is dynamic and proactive, leading the finance function for clients by thinking creatively and taking initiative to ensure that our clients have the means to make informed strategic decisions and financial plans.

Customer satisfaction, timely delivery and profitability are key performance indicators.

**POSITION: ACCOUNT MANAGER**

**Reports to:** Chief Executive Officer

**Working Relationships:** This position works in collaboration with AFG’s Accounting team and Chief Operating Officer. This position has no direct reports.

<p><b>Key Result Areas</b></p>	<p>The Account Manager is responsible for:</p> <ul style="list-style-type: none"> <li>• Providing timely and accurate information and advice to our clients</li> <li>• Developing client relationships</li> <li>• Ensuring AFG solutions are meeting client needs and expectations</li> <li>• Working in collaboration with AFG accounting team to proactively manage client service delivery issues and risks</li> <li>• Supporting client CEO, Board and Senior Managers to understand and improve their finances for sustainability and resilience</li> <li>• Planning the finance cycle for client portfolio to ensure all financial reporting and compliance obligations are met on time</li> <li>• Leveraging and acquiring new client relationships to support AFG growth objectives</li> </ul>
<p><b>Key Performance Indicators</b></p>	<ul style="list-style-type: none"> <li>• Responsiveness - Freshdesk tickets are closed on time, initial response within 24 hours</li> <li>• Deadlines are met - Jetpack jobs are completed on time</li> <li>• Client retention of 95% or better</li> <li>• No client exits due to dissatisfaction</li> <li>• Client information is properly captured and stored</li> </ul>
<p><b>Fostering Client Relationships</b></p>	<ul style="list-style-type: none"> <li>• Actively manage and support a portfolio of clients</li> <li>• Build and strengthen key relationships with clients and establish confidence with the Board and other key stakeholders</li> <li>• Actively participate in client Board and senior management meetings as invited; provide proactive and innovative advice relevant to the client’s needs, plans and goals</li> <li>• Become familiar with the business activities, programs and staffing of each client</li> <li>• Collaborate with the Chief Operating Officer, ensure that onboarding is managed well and a positive “trusted advisor” relationship is established with new clients</li> <li>• Engage with the AFG accounting team to ensure client needs are met, share client knowledge, facilitate the resolution of issues and proactively manage risk</li> </ul>
<p><b>Building Financial Intelligence &amp; Continuous Learning</b></p>	<ul style="list-style-type: none"> <li>• Build client capability in understanding financial reports and budget processes</li> <li>• In consultation with clients, develop financial performance and reporting frameworks</li> <li>• Identification of project work opportunities – manage and deliver as required</li> <li>• Prepare FAQs/short articles on topics of interest re NFP accounting, finance, compliance and governance</li> <li>• Maintain knowledge of NFP accounting and compliance matters and remain abreast of future developments in these areas</li> </ul>
<p><b>Outstanding</b></p>	<ul style="list-style-type: none"> <li>• Have a clear understanding of contractual arrangements for each client and</li> </ul>

<p><b>Service Delivery</b></p>	<p>ensure AFG delivery is on time and on budget</p> <ul style="list-style-type: none"> <li>● Plan client work to achieve timely delivery, liaise with Chief Operating Officer to schedule resources</li> <li>● Plan delivery deadlines and lead reporting, budgeting and audit for each client</li> <li>● Train, coach and mentor clients' staff with budget/financial responsibility as required</li> <li>● Review and recommend best practice finance procedures, based on AFG standard processes and 'best and highest' use of technology</li> <li>● Assist the AFG bookkeeping and accounting team as required including with banking</li> <li>● Accessing ATO portals</li> </ul>
<p><b>Business Development and Identifying Opportunities</b></p>	<ul style="list-style-type: none"> <li>● Continuously investigate methods of identifying and attracting new clients to AFG</li> <li>● Leverage opportunities for new projects</li> <li>● Articulate the benefits of using Accounting For Good's services through presenting proposals to prospects and speaking at networking and industry events</li> <li>● Actively seek referrals from existing clients, assist AFG CEOs to develop and present proposals to CEO and Boards</li> </ul>
<p><b>Software</b></p>	<ul style="list-style-type: none"> <li>● Xero</li> <li>● Xero Workpapers</li> <li>● Spotlight Reporting</li> <li>● Google Suite</li> <li>● Freshdesk</li> <li>● Jetpack</li> <li>● Dext</li> <li>● Approval Max</li> <li>● Slack</li> </ul>
<p><b>Skills and Experience (selection criteria)</b></p>	<p><b>Essential</b></p> <ul style="list-style-type: none"> <li>● Proven ability to build rapport and effectively manage client relationships</li> <li>● CA/CPA/relevant tertiary qualifications and extensive non-profit accounting experience</li> <li>● Demonstrated experience in providing financial management advice</li> <li>● Experience or a desire to work with non-profit organisations</li> <li>● Excellent writing and communication skills, with a knack for making technical information understandable</li> <li>● Demonstrated ability to prepare and interpret financial reports, and translate into meaningful, plain-English insights and recommendations</li> <li>● Proactive and forward-thinking</li> <li>● Takes initiative</li> <li>● Lateral thinker with the ability to develop creative solutions</li> <li>● Quick thinking and adaptable</li> <li>● Demonstrated client-centeredness and commitment to excellence in service delivery</li> <li>● Confident and comfortable in communicating with and advising senior leaders and Board members</li> <li>● Skilled in troubleshooting and problem solving</li> </ul>

	<ul style="list-style-type: none"><li>• Ability to manage competing priorities with peaks in demands</li><li>• Xero certification and expertise in Xero accounting</li><li>• Patience, empathy and a sense of humour</li><li>• Willingness to learn and continuously self-improve</li></ul> <p><b>Desirable</b></p> <ul style="list-style-type: none"><li>• Knowledge of software programs listed above</li><li>• Proficiency with other accounting and reporting software</li><li>• Contract management experience</li><li>• Cross-cultural awareness</li></ul>
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