



CREATIVE PLANNING

Title: **Audit Senior**

Location: Omaha, NE

JOB SUMMARY

The Creative Planning Business Services **Audit Senior** works to provide excellent attest preparation services in a variety of industries as a member of BerganKDV*. The Audit Senior plays a key role in executing audit engagements while contributing to the success of the broader audit team. This position is responsible for carrying out the audit plan as developed by the engagement team and ensuring high-quality client service.

Audit Seniors are actively involved in identifying areas for process improvement, enhancing technical skills, and supporting firm initiatives. They serve as both contributors and leaders on audit engagements, performing test work, managing assigned projects, and providing input on client financial statements. In addition, they help foster strong client relationships built on trust and professionalism.

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 teammates by participating in company sponsored trainings, CPE courses, internal committees, and mentorship opportunities.
- Actively participate in firmwide meetings, committees and teams.

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

- 2+ years of professional services experience
- A bachelor's degree in accounting or related degree
- CPA Certification preferred

TECHNICAL SKILLS

- Risk assessment and analysis
- Research and understand professional frameworks, standards, and guidance
- Exceptional analytical, teamwork, and organizational skills
- Detail oriented
- Quality control
- 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.*