

General Job Description:

Who we are:

We are a creative, fun and passionate team of accountants, financial strategists and business advisors. We have locations in beautiful Downtown Boulder, CO right on Pearl Street as well as in sunny San Diego, CA in Sorrento Valley. We also have a presence in the San Francisco Bay Area as well as Denver. We help creative businesses, from branding and marketing agencies to innovative tech companies, understand their worth and unleash their potential. We also do a lot of the things you'd expect a traditional CPA firm to do, but we are so much more, we are a financial studio.

We are looking for:

Someone to take on a dual role that is part Business Advisor part Onboarding Specialist (i.e. an accountant or bookkeeper—a numbers-oriented person—that is also a great communicator and project manager)

What a typical day might be like:

For a Business Advisor each day is filled with a variety of rewarding tasks, that you will surely appreciate if you are the type of person that enjoys helping business owners grow their businesses and achieve their business goals. Business Advisors have worked in an accounting or similar role for 2 or more years and are able to work autonomously on client accounting projects.

As a Business Advisor, in addition to basic accounting work, you also have enough skill and experience to spot growth opportunities for clients as well as potential issues that will save our clients in costs and headaches in the future. You will have the chance to establish and foster relationships that have meaning as you help clients understand the story behind the numbers in their finances and plan their journey ahead.

Onboarding Specialists have an important role at the beginning of each client engagement. They are great at ensuring new clients have a wonderful client experience from day one. They are able to connect with clients in meaningful ways that create value and help clients feel that they are attaining peace of mind by working with our team. Onboarding Specialists are savvy with SaaS technologies and are great at project management; ensuring that our client's initial setup, time sensitive deadlines, and engagement scope are being addressed during the onboarding phase.

Your typical day may include the following tasks.

- Closing client books monthly, quarterly and annually
- Reconciling non-cash accounts
- Financial Statement Preparation
- Project management of new client onboarding
- Ongoing client collaboration and proactive communication, especially with new clients
- Updates of SaaS applications & sync's
- Budgeting and Forecasts
- Strategic Planning

Some other cool stuff to know:

We are a collaborative team that often collaborates with our remote offices through video conferencing. We learn from each other's insights and experiences whether you have been with the company for 10+ years or just starting your first day.

Much of the work we do is completed on SaaS based technologies and accounting packages including QuickBooks Online.

This job might be for you if:

- You are really good with computers, the internet, and can easily navigate through SaaS based technology (and you know what SaaS means)
- You enjoy working in Excel spreadsheets and you google functions that could make your spreadsheet even cooler
- You are an excellent communicator and understand that includes being a good listener
- You Like to be organized and help others stay organized
- You take good notes when needed and ask questions when something is not clear
- You are good at keeping a schedule and have a good memory or methods to help you remember deadlines
- You are detail oriented and proof read things that you write or type to make sure they are accurate
- You like numbers and you think working with accountants and clients would be fun

Onboarding / Business Advisor

- You get things done and you take pride in doing things right

You might be a really good fit if:

- You have relevant Accounting Experience
- You are great at task management and project management
- You have experience working with business owners and/or managing client engagements
- You have worked with QuickBooks Online and/or other SaaS accounting technology

The Pay and the Perks:

We offer competitive salaries and great medical benefits like health, dental, vision, AD&D, LT & ST disability, and life insurance coverage. Full time employees are also eligible for 401(k), PTO, and paid holiday time.

If this all sounds like you:

Please send your resume, salary requirements, and cover letter to careers@richtr.io, specifying the position you are applying for ("Business Advisor" – SD or Boulder??) in the email subject line. In the cover letter please include why you think you would be a good fit at Richtr.