



Client Manager, Taxation and Accounting Services

About MGD

MGD is a leading boutique accounting and financial services firm, a first adopter of a fully integrated financial advice solution for high net worth business owners and professionals.

With offices in South Brisbane and Sydney CBD, MGD provides a suite of specialist advice services for clients across the core disciplines of taxation, accounting, business services, self-managed superannuation, investment, and personal risk interwoven with succession and estate planning, banking, finance, and philanthropy.

MGD is privately-owned and operates under its own Australian Financial Services Licence.

The Role

Due to a high level of business growth and expansion in the taxation and accounting services arm of the firm, MGD Tax, we have a newly created role of Client Manager for an exceptional candidate.

The key responsibility area (KRA) of this position is your ability to support our Directors in providing both compliance and advisory services to a portfolio of high net worth and ultra-high net worth professionals and private businesses (including significant privately-owned family groups) which operate across multiple professions and industries.

You must be able to demonstrate that ability to our Directors, and with their active support, a capability for business development, we anticipate that you will over time forge your own path to become a fellow Director of the practice.

Some Key Responsibilities Include:

- Supporting the Directors in managing and delivering complex client engagements across a diverse portfolio of successful private entities, including high net worth individuals, start-ups, and family groups.
- Collaborating with clients to understand their complete business needs, with a focus on providing strategies and advice in relation to accounting and reporting, budgeting and cash flow planning, tax planning, and business structuring, estate planning, and business succession.
- Preparing financial reports and income tax returns for companies, partnerships, trusts, and individuals.
- Meeting with clients and managing client queries.
- Assisting with team management, including workflow management, delegating and reviewing work, and providing on-the-job training, supervision, and technical training.
- Acting as a recognisable role model and inspiring others to embrace and live the firm's purpose and values.





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Skills and Experience:

- A minimum of eight years of experience working within Australian professional practice in the areas of tax compliance, accounting, tax advice, and corporate compliance.
 - Qualified CA, CPA, or CTA or with a Masters of Taxation regarded highly.
 - Client management skills, including relationship management and organisational skills.
 - Exposure in working with a diverse range of business and professional clients, and providing taxation, accounting, and business services.
 - Experience with MYOB AE, System Release, Xero, and other MYOB software.
 - Enthusiasm with regard to sourcing opportunities to develop the business within the existing portfolio of work.
 - Advanced technical knowledge and compliance experience.
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Who You Are

You are proactive, lateral, and driven to be a highly successful professional in our high-end private client market. The icing on the cake for you and for us is your interpersonal skills. We expect that you will fit in relatively easily, developing strong professional relationships with your clients, team members, our referrers, and advice partners.

Yes, you are a rarity; but so are we.

You have already demonstrated success in your current role but it isn't quite right for you and you are looking for something more. Because you are quality, we anticipate that your current firm will try to hang on to you and that some clients will want to follow you. Having said that, we don't expect you to bring any clients.

You are aware of and realistic about the path to becoming a Director or Partner in a quality firm like ours.

To Apply

If you believe you are right to be considered for this unique opportunity, please send your cover letter addressing why you would like to join MGD and your resume to Mrs Jenny Wood at jwood@mgdwealth.com.au.

Only applicants shortlisted for an interview will be contacted.

All applicants must be Australian Citizens or hold a current valid Australian work visa.

MGD is an equal opportunity employer.

