

Seeba & Associates, Inc.
Certified Public Accountants

San Jose, California

<http://www.seebaassociates.com/>



Audit CPA / CPA Candidate

Opportunity Profile

OVERVIEW

Located in the heart of California's Silicon Valley (San Jose), Seeba & Associates is seeking a Audit CPA or CPA Candidate to join their Firm. S&A has become well known to entrepreneurial small businesses, to estate planning professionals, and to the Bay Area Christian community. Its original founders brought backgrounds in tax, auditing, and the management of nonprofit organizations to the Firm. Dave Seeba now runs the Firm with the help of talented associates.

The Firm has a significant tax preparation and consulting practice. In addition, the Firm has conducted numerous audits and reviews of Christian charitable organizations. It is well equipped to address a myriad of issues facing Christian nonprofits. This blend of expertise means that individuals looking for help with tax planning and tax-advantaged giving will also find a unique and valuable resource at Seeba & Associates.

THE FIRM'S COMMITMENT

Seeba & Associates believes in the value of relationships and believes that their success is a result of helping clients to achieve their own success.

S&A is committed to providing close, personal attention to their clients. They take pride in giving their clients the assurance that the personal assistance they receive comes from years of advanced training, technical experience and financial acumen. Their continual investment of time and resources in professional continuing education, state-of-the-art computer technology and extensive business relationships is indicative of their commitment to excellence.

ORGANIZATIONAL CULTURE

Seeba & Associates conduct themselves with integrity, a sense of teamwork, and a deep commitment to their clients. The Firm values professionalism, and believes it is critical for them to demonstrate integrity in all situations.

There is a strong element of S&A employees satisfying the need for meaningful work in the assistance the Firm provides for its clients. The staff recognizes that Seeba & Associates is an entrepreneurial, inspiring and unique workplace. This is a hard-working, close-knit group who is highly motivated and carries out their work with excellence. The staff also recognizes the part each team member plays in helping faith-based organizations further their own mission and their need for financial accountability. The staff is also aware of the goals that individual clients feel they are being called to and the staff is invested in seeing those personal goals achieved.

Staff members are encouraged by Dave Seeba, and other Principals of the Firm (Anna Philip CPA, Grant Dow, CPA, MST and Kitty Mak, CPA, MBA) to provide excellence and creativity within the context of accounting/tax processes and procedures. Dave is described by the team as collaborative, strongly goal- and metrics-focused, and an effective vision caster with the desire to release competent people to do their jobs with a sense of empowerment. Dave sincerely cares about the staff as well as S&A clients' mission effectiveness.

The S&A team works towards being a unified and integrated unit, motivated to innovate and improve while delivering strong performance. Team members' input on issues is welcomed and suggesting

alternative ideas is perceived as positive. This is a culture of “all hands helping.” The Firm’s leaders, while operating within a highly collaborative team, are encouraged to work independently with minimal direction. This is not a political environment. Great care is taken to assure that team members treat each other with dignity, respect and foster a healthy relational climate. As a result, the group is transparent, open, and creates a climate of trust.

LEADERSHIP

DAVID A. SEEBA is a Certified Public Accountant having significant experience with individuals, small businesses, and charitable organizations. Dave received his CPA certificate in 1975 and continued his education through Golden Gate University. In 1980, Dave and a partner began the Firm. Dave was also a founder of the Planned Giving Foundation which provided estate planning and deferred giving consultation to donors of Bay Area charities from 1991 through 1997. He currently serves on the board of some Silicon Valley foundations as well as helping his clients with their tax and accounting needs.

ANNA M. PHILIP, CPA, joined Seeba & Associates as an auditor in 2002. She received her CPA certification in 2005. Anna has a degree in Commerce and has worked as an accountant for a school, tax associate, and auditor prior to joining the Firm. Anna currently focuses on tax returns for individuals, Non-Profits, S-Corporations, Partnerships, Estates, and Trusts. Anna also manages a group providing private office services to key client families. She has also done non-profit audits, reviews and compilations, in addition to providing consulting for various non-profits.

GRANT DOW, CPA, MST, joined Seeba and Associates in 2016 as both an experienced auditor and tax preparer. He has over twenty years of experience working in accounting and finance, including nine years working in industry for private and publicly-traded technology companies before transitioning over to public accounting in 2004. Grant spent his first eight years in public accounting primarily focused on providing audit & review services to various for-profit and nonprofit clients in the Bay Area. Since 2011, he has primarily focused on assisting businesses and individuals with their various tax-related issues as well as consulting with them on other financial matters. Grant received his BA in Economics from University of California, Santa Cruz in 1993, his CPA certification in 2007, and his MS in Taxation from San Jose State University in 2013.

KITTY N. MAK, CPA, MBA, graduated from California Polytechnic State University, San Luis Obispo in 1999 with a BS in Business Administration with a concentration in accounting. She received her CPA certification in 2006 and got her MBA at Golden Gate University in 2012. Kitty started her career in the real estate group with Ernst & Young, LLP. There she prepared and reviewed real estate partnership returns as well as returns of high net-worth individuals. She then worked for a pharmaceutical venture capital firm in San Francisco while pursuing her MBA degree. At the venture capital firm, she continued to use her partnership expertise to be their in-house tax consultant and helped manage \$2 billion of assets. Prior to joining Seeba & Associates in 2022, she was a senior manager at Holthouse, Carlin, and Van Trigg, LLP where she served commercial and residential real estate owners and developers. She also oversaw the tax returns for these real estate professionals, their families, and trusts.

REVENUE SUMMARY

17% Audits/Reviews/Compilations (nonprofits)
22% Accounting and Bookkeeping (including Private Family Office bookkeeping)
11% Accounting and Management Consultation (nonprofit & for-profit entities)
11% Tax Consultation (for profit entities)
20% Tax Preparation (Businesses, Trusts, & Estates)
19% Tax Preparation (Individuals)
100%

WHAT TEAM MEMBERS SAY ABOUT WORKING AT SEEBA & ASSOCIATES.

“...we are an entrepreneurial, highly collegial and supportive team...”

“...the candidate will likely wear several hats (Tax, Audits, and Consulting); it would be great if they have experience with nonprofit and faith-based organizations...”

“...we are about teamwork, common goals, increasing efficiency, and doing our part to help the client move their mission forward...”

“...it is a fabulous team and this is a great place to apply top accounting skills to support ministries...I am amazingly blessed to combine my CPA skills with my faith in order to serve...”

“...I really appreciate the voluntary bi-weekly prayer times; Dave cares about us as individuals—when I was going through a tough time, he would call to check on me...”

“...we are a great team, encouraged to share information, and though there is strong accountability and attention to details, we are not micromanaged ...”

“...we work closely—we care about the mission and enjoy working with intensity alongside one another—we are colleagues and friends; the candidate should be willing and not afraid to ask questions, roll up their sleeves, and be fully invested...they must be about excellence...”

“...he or she must be comfortable working with varied populations and settings—including high net-worth individuals, complicated/sophisticated organizations, pastors and Christian nonprofits—we are about caring for clients who, in turn, care about their ministries...”

“...we are looking for someone with vision, one who sees the future five to six years out but can make it happen in the present...”

“...the person cannot be aggressive nor timid—must have the ability to play to strengths, good timing, and a sense of tact—a willingness to volley ideas back and forth with conviction to stand on their idea but with the courage and maturity to defer to others as well ...”

“...I have never worked in a firm that is so pleasant, even during the stressful tax season—there is no drama, people are polite, civil...”

THE POSITION

Overview

We are seeking a CPA (or CPA Candidate) to join Seeba & Associates as a Staff Accountant. We need someone with at least a couple years of experience at a CPA firm (preferably in audit). They would need to be interested in also developing in the tax area. A third of their year's activity (from January through April) would be preparing tax returns. The other eight months would be participating in our audit/review/compilation work. Our audits and reviews are solely of Christian churches & ministries, so we need a person with an interest in those entities as well as some professional experience with charitable nonprofits, or finance-related volunteer experience. It would be great to get someone located near our San Jose office, but setting up a telecommuting arrangement for up to 85% of their time is a possibility. We are anticipating this to be a full-time position, but if someone had significant experience and prefers a part-time position, we would consider that as well.

Duties & Responsibilities

- Perform compilation, review, and audit engagements including fieldwork and financial statement preparation.
- Prepare adjusting journal entries to correct client entries, if necessary.
- Assist clients with schedules and financial statement preparation required for these engagements as many of our clients are volunteers and thus need direction and guidance.
- Perform substantive testing for audits.
- Perform audit fraud interviews with client's staff and board members.
- Identify internal control weaknesses and accounting errors, then write recommendations for management and the board of directors.
- Perform tax preparation for individuals, businesses, trusts, and nonprofits.
- Contact clients for detailed tax documents when information is incomplete.
- Build trusting relationship with clients.
- Prepare tax workpapers for complex tax returns.
- Assist in tax consultation if requested by clients.
- Research simple tax issues to properly identify and apply tax principles.
- Be available during client working hours – Monday through Friday from approximately 9am to 5pm PST.

Personal and Professional Qualifications

- Be ethical by always seeking to do the right thing and also seeking to understand what that is.
- Organized in their work and in their work products.
- Take initiative by being a self-starter, diligent in pursuing work to completion, and always learning.
- Be goal oriented, aiming to produce tangible results that exceed expectations.
- Driven to improve processes and utilize technology to lower costs and improve results.
- Understand and utilize metrics to measure and improve performance.
- Be comfortable in a dynamic/entrepreneurial environment.

- Have excellent communication skills, possessing a firm, but pleasant manner that engenders confidence and respect with both staff and clients. Establishes rapport with clients easily and develops good working relationships with client personnel.
- Maintain contacts with peers and networks, and cultivate referrals.
- Have an interest in serving Christian churches and ministries. Although the Firm has many other types of clients, this has grown to become a significant niche market for the Firm, so there must be an interest in following the personnel, tax, audit, legal, and organizational issues applicable to these types of organizations.
- Communicate clearly, both verbally and in writing.
- Possess great attention to detail and be able to spot when something is missing.
- Be able to read and accurately interpret technical literature and legal documents.
- Be able to analyze tax notices, draft effective responses, and assist clients on federal, state and local audits.
- Address client complaints and resolve problems.
- Interact effectively with all levels of employees within the organization, to include peers, co-workers and supervisors.
- Provide and accept constructive criticism in a respectful, open and interactive manner.

Requirements

- Bachelor's degree (B.A. or B.S.) in Accounting, with an excellent GPA, including a minimum 3.5 GPA in accounting major courses.
- Current CPA license or CPA candidate (ideal for audit) with prior experience in public accounting covering both audit and review engagements.
- Good communication skills with both colleagues and clients.
- Strong attention to detail and effective work habits.
- An interest in the success of Christian churches and ministries.
- Willingness to complete a Myers-Briggs-style personality inventory (conducted by S&A) as part of the search process.
- Experience with non-profit accounting and software preferred.
- Experience with accounting software, such as QuickBooks, and tax software, such as ProSystem, preferred.

THE SEARCH PROCESS

If you know someone who has an interest and meets most of the experience and motivational requirements described in this profile, please feel free to suggest that person for consideration and/or forward this information.

Please request they forward their résumé to the contact below. Suggested names will be treated discreetly and candidates should be assured that their inquiries will be treated with the utmost confidentiality.

Seeba & Associates is an equal opportunity employer and does not discriminate on the basis of race, religion, age, color, sex, national origin, familial status, veteran status, or physical handicap.

We fully respect the need for confidentiality of information supplied by interested parties and assure them that their specific backgrounds and interests will not be discussed with anyone, without their prior consent, nor will reference contacts be made until mutual interest has been established.

For further information on this position, please contact

Grant Dow

Seeba & Associates, Inc. CPAs

1825 Hamilton Ave, San Jose, CA 95125

408.264.7800 (tel)

408.264.7804 (fax)

info@seebacpa.com

www.seebacpa.com