



Recruitment Pack: Trainee Chartered Accountant

The Firm

Godfrey Wilson is an award-winning charity-specialist practice in Bristol. Having built a reputation as a leading provider of audit and accountancy services to small and medium sized charities, we now work with over 150 charities in Bristol and nationally.

We have developed a reputation for our fresh, down-to-earth approach and our ability to make the principles of good financial management easy to understand and implement.

We are a close-knit, people-focused firm. We recognise that our success is due to the skills and professionalism of our team. Our staff are driven to provide the highest levels of customer service and are committed to delivering quality and excellence.

We have strong ethical and environmental credentials, with policies on charitable giving, recycling, fair trade, sustainable transport and green energy.

Staff

We are a small but growing firm. The firm has two partners – Alison Godfrey and Rob Wilson - and fourteen staff. These include two qualified audit managers, a qualified audit senior, five trainee chartered accountants, five bookkeepers/payroll officers and an office administrator.

Clients

We serve approximately 400 clients, with around 75% coming from the not-for-profit sector. Most of our clients are located in Bristol and the South West, however we work with clients from across the UK. Our clients vary in size with turnovers ranging from £10,000 to £15m.

Vision

It is our vision to expand the business over the coming years, take on a larger team of staff, and further develop our reputation as a leading firm providing charity-specialist accountancy services.

Further information about the firm can be found on our website: www.godfreywilson.co.uk.

The Role

The role is an audit-focussed role but with exposure to a variety of work assignments, including audit and assurance, accounts preparation, bookkeeping, tax and payroll.

Audit clients will primarily be small charities typically with a turnover of up to £5m. Non-audit clients will primarily be small limited companies, partnerships and sole traders.

Responsibilities will include: assisting with audit assignments (including audit planning, audit testing, drafting and checking accounts, preparation and completion of audit files for manager review), assisting with accounts preparation (including drafting accounts from client records, using Xero, QuickBooks, Sage or Excel) and assisting across all areas of the firm (tax, bookkeeping, payroll and administration) as required.

Staff undertake work at a level appropriate to their skills and experience under supervision of more experienced staff. As staff progress and gain experience, they take on more responsibility for each assignment. Eventually, they will be supervising and training staff themselves and will also be providing other services to clients, such as advice on all aspects of accountancy and tax.

As the firm is small, trainees will experience a steep learning curve and will be expected to take on significant responsibility early on in their career. We do not have separate departments for tax, audit and accountancy so staff quickly develop a broad skillset across all accountancy disciplines. In return, staff are rewarded with rapid career progression and the opportunity to manage their own client portfolio early in their career.

Person Specification

We are looking for someone who has all the necessary skills to become an excellent accountant, but who is looking for more than just a training contract. You will share the firm's values and ethos and will be looking for a career that delivers a sense of purpose – somewhere where you can use your skills in a meaningful way. You will feel more at home in a small firm, than a large corporation, and will be looking for somewhere where you can play an integral part in the firm's success.

Education and Experience:

- No prior accountancy experience is necessary;
- British university degree class 2:1 or above;
- Three A levels grade A*- C; and
- IT literate – familiarity with MS Office (Word and Excel).

Skills and Attributes:

- An interest in, or experience of, the charity sector, and a commitment to ethical values;
- Desire to work for a small firm, not a large corporation;
- A good work ethic – hard-working with desire to learn, progress and take on responsibility;
- An exceptional communicator – verbal and written;
- Emotional intelligence – ability to read situations and adapt accordingly;
- The ability to quickly assimilate large amounts of information and demonstrate clear, logical thinking;
- Excellent attention to detail, and a commitment to quality outputs;
- Strong teamworking – ability to work collaboratively to achieve a shared goal;
- Good timekeeping and organisation - ability to work to tight deadlines under pressure; and
- Ability to work flexibly, including local/national travel and over-time (at peak times).

Other:

- Right to work in the UK; and
- Clean driving licence and access to a vehicle which you are prepared to use to travel to clients' premises as and when required.

Salary Scales and Job Progression

The starting salary for a Year 1 trainee is £21,000 per annum. Salaries are normally increased annually at the discretion of the directors, subject to exam passes and satisfactory performance on work assignments.

In year 1, trainees will assist senior staff on audit assignments. Senior staff will delegate tasks to the trainee and will closely supervise their work. Year 1 trainees will be given exposure to a wide variety of work assignments and clients, and will be expected to learn quickly and use their initiative. By the end of year 1 the trainee will be expected to pass all of the "Certificate Level" exams and demonstrate sufficient progress in their work assignments.

In year 2, trainees will be expected to work with less supervision. On smaller jobs the trainee will be expected to complete the bulk of the work unsupervised. On larger jobs the trainee will be given whole sections of the file to complete, whilst working under the overall supervision of a senior staff member. By the end of year 2 the trainee will be expected to pass all of the "Professional Level" exams and demonstrate sufficient progress in their work assignments.

In year 3, trainees will largely be expected to take sole responsibility for the audit assignments they work on. This will involve planning the audit, conducting the audit testing, finalising the audit file and preparing the accounts and letters. The file and accounts will be reviewed by a partner at the planning stage and finalisation stage, with minimal corrections and adjustments required. By the end of year 3 the trainee will be expected to pass all of the "Advanced Level" exams (including the "Case Study") and demonstrate sufficient progress in their work assignments.

The Trainee Chartered Accountant role is for a fixed term of 3 years. On successful completion of the training contract (i.e. all exams passed and full membership of ICAEW achieved) the employee may be offered a permanent position within the firm (subject to there being a vacant position).

Other Benefits

We provide:

- Welcome bonus of £1,000 on completion of your probation period;
- payment of study courses, exam fees and required study texts;
- paid study leave;
- paid time off on the day of the exam;
- payment of membership fees to ICAEW;
- 3 year training contract for ACA, structured as a Level 7 Apprenticeship;
- On-the-job training and mentoring.

Working Hours

We work a 35-hour week. We have a flexible working policy which means you can adapt your hours to suit, subject to core office hours and client/college commitments. The nature of our work means that we have to fit in with client working hours and deadlines. This can mean there may be occasions where you will be required to work outside these hours or do overtime. Some work requires staying away overnight.

Holidays

25 days annual leave plus bank holidays.

Start Date

The role will start in either July or September 2020.

Things To Consider Before Applying For This Post

- Studying towards your ACA qualification whilst getting real work experience is very demanding. It requires hard work and a high level of commitment that is not appropriate for anyone who is undertaking any other training or study at the same time. You must be prepared to give up a proportion of your spare time to study over the three years.
- The majority of our work takes place at our clients' premises rather than our own. You must have a clean driving licence and unrestricted access to a car which you can use for work (mileage is reimbursed at 45p per mile).
- Most of our clients are within 30 miles of Bristol but you must be prepared to travel further afield and occasionally be prepared to stay away overnight.

Application Form: Trainee Chartered Accountant

PERSONAL DETAILS	
Full Name:	
Date of Birth:	
Address:	
Telephone Number: (please provide a number where you can be contacted during office hours)	
Email:	
Do you have any visa, work permit or other restrictions on working in the UK?	
Have you been convicted of a criminal offence (which is not a spent conviction under the Rehabilitation of Offenders Legislation)? If yes, please provide further details.	
Do you have a current driving licence?	
If yes, do you have access to a car that you can use for work as and when required?	
Do you have any medical conditions that we should be aware of?	
Where did you hear about the vacancy?	

Application Form: Trainee Chartered Accountant

EDUCATION AND QUALIFICATIONS	
UK Degree:	Subject: Result: University: Year of Graduation:
A-Levels (or equivalent):	Subjects & Grades: School or College: Year Qualification Obtained:

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EDUCATION AND QUALIFICATIONS (continued)	
<p>GCSEs (or equivalent):</p>	<p>Subjects & Grades:</p> <p>School or College:</p> <p>Year Qualification Obtained:</p>
<p>Other Relevant Training or Qualifications:</p> <p>(please list any other training courses attended which you think are relevant to this application)</p>	

Application Form: Trainee Chartered Accountant

EMPLOYMENT	
Please give details of your four most recent employment or volunteer roles (if applicable), with the most recent first. Please explain any gaps in your employment history.	
Employer:	Employer:
Dates:	Dates:
Job Title:	Job Title:
Duties & Responsibilities:	Duties & Responsibilities:
Final Salary:	Final Salary:
Reason for Leaving:	Reason for Leaving:

Application Form: Trainee Chartered Accountant

EMPLOYMENT (continued)	
Employer:	Employer:
Dates:	Dates:
Job Title:	Job Title:
Duties & Responsibilities:	Duties & Responsibilities:
Final Salary:	Final Salary:
Reason for Leaving:	Reason for Leaving:

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FURTHER INFORMATION
I. Why do you want to work for Godfrey Wilson? (max 200 words)

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Application Form: Trainee Chartered Accountant

2. Please explain how you meet the criteria set out in the Skills and Attributes section of the recruitment pack, giving examples where possible. (max 500 words)

Application Form: Trainee Chartered Accountant

3. What are your personal interests and hobbies?

REFERENCES

Please supply two references, including your current/most recent employer. References will not be contacted until after a job offer has been made.

Reference 1:

Reference 2:

Company/Institution:

Company/Institution:

Contact Name & Job Title:

Contact Name & Job Title:

Relationship to You:

Relationship to You:

Email Address & Tel No:

Email Address & Tel No:

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DECLARATION	
I confirm that the information contained in this application is complete and correct. I understand that any false information or deliberate omissions will cause my application for employment to be unsuccessful or, in the event of employment, render me liable to dismissal. I consent to Godfrey Wilson Limited using and keeping the information I have provided on this application form and information supplied by third parties.	
Signed:	Date:

The closing date for applications is Friday 17 April at 5pm. Please return the completed application form to:

louisa@godfreywilson.co.uk

or

Louisa Watkiss
Godfrey Wilson Limited
5th Floor Mariner House
62 Prince Street
Bristol
BS1 4QD

If you have any questions, please contact Louisa Watkiss on 0117 971 3445 or louisa@godfreywilson.co.uk.