

IE SHAFFER

PLAN ADMINISTRATORS

Assistant Controller

Overview:

I.E. Shaffer & Co is seeking a dynamic, self-directed individual to serve as its new Assistant Controller. Reporting to the Controller, this person is responsible for leadership and oversight of our benefit fund client Accounting Department including an Accounting Supervisor and staff of four Accounting Specialists.

The successful candidate must be able to work collaboratively with the Accounting Department staff and other operational areas of the firm, along with the Controller and senior leadership team. In addition, this individual will serve as lead in coordinating and supporting external client benefit fund auditors.

Specific Responsibilities:

- Oversee and manage day to day accounting department functions including supervision of the accounting staff.
- Prepare various plan trial balances and other financial reports at plan year end for audit by external auditors.
- Prepare cash basis plan financial statements for presentation at quarterly client board of trustee meetings.
- Supervise/prepare all client bank reconciliations and close accounting for each month.
- Manage and maintain banking relationships for all client bank accounts.
- File quarterly Form 941 for any plans that pay disability or payroll.
- Make state income tax deposits weekly or monthly as needed.
- Set up new clients in accounting system and input current plan year activity if needed.
- Prepare and reconcile year-end tax forms (W-2,1099R,1099M).
- File annual Form 945 for all pension funds.
- File annual Forms 5500 and 990 for certain specific client benefit funds.
- Prepare necessary audit requests from external client auditors and facilitate on-site and/or remote audits.
- Communicate with participants of client benefit funds on an as needed basis

Required Qualifications:

- Bachelor's degree in accounting, finance, business administration or related field of study.
- 3 to 5 years of related accounting experience.

- Working knowledge of Excel and Word.
- Experience working for or auditing multi-employer Taft-Hartley benefit funds.
- Experience preparing Forms 5500 and 990
 - Knowledge of CCH ProSystem fx Tax a plus.
- Specific knowledge of Form 5500 Schedule A and C requirements.
- Specific knowledge of the preparation of Form 8955-SSA.
- Experience with quarterly payroll tax form preparation.

Compensation & Benefits:

In addition to competitive salaries, we offer extensive benefits including but not limited to the following:

- Health Benefits (medical, dental and vision)
- Health Savings Account and/or Flexible Spending Account (HSA/FSA)
- 401(K) with Employer Match
- Employee Stock Ownership Plan (ESOP)
- Annual Performance & Holiday Bonuses
- Paid Holidays
- Paid Time Off
- Long-term Disability
- Life Insurance

I.E. Shaffer & Co. is an Equal Employment Opportunity Employer. We are committed to providing an environment of mutual respect where equal opportunities are available to all applicants and employees based on merit and without regard to race, color, religion, sex, pregnancy, national origin, age, disability, marital status, sexual orientation, gender, military and veteran status or any other characteristic protected by applicable law.

For interested applicants, please send questions along with your resume to: careers@ieshaffer.com