



Your Path to Becoming a SSF Rockstar.

**SENSIBA SAN FILIPPO LLP**

CERTIFIED PUBLIC ACCOUNTANTS AND BUSINESS ADVISORS



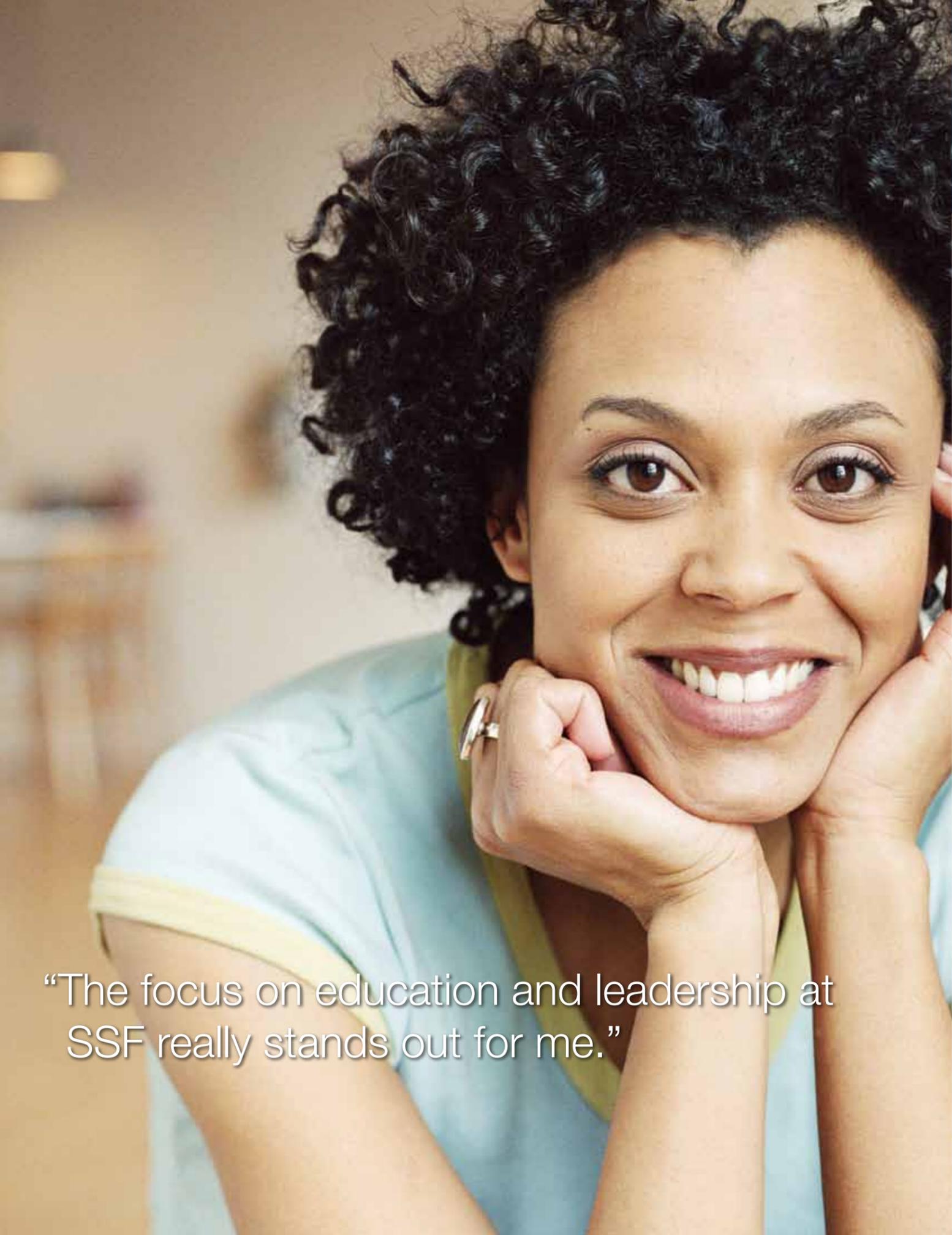
At SSF, your opportunities are wide open.

Sensiba San Filippo has developed, built and sustained its professional reputation and loyal client following solely on the talent and efforts of our team.

As an important member of this team, the Firm is committed to both your professional and personal growth as you traverse your career at SSF. Professional development and advancement is a two-way street — the Firm will look to you for leadership and feedback and in return, we are committed to providing you with appropriate support and resources at each stage of your career.

We have prepared this booklet to provide you with an overview of how your client service career unfolds at SSF, and how each level contributes to the combined efforts of the Firm. Your path to Partner will require dedication and a passion for excellent client service — a passion to be the best. We are so excited that you are here, and look forward to working with you to build an SSF career filled with fun, challenging work, financial success, and life-long client and colleague relationships.

“ I wanted to join a Firm that was committed to developing its people.”



“The focus on education and leadership at SSF really stands out for me.”

# ASSOCIATE

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TIMELINE —→ 1 to 2 Years

## ASSOCIATE

- Time of transition to “the real world”
- Learn what the Firm does and your role in it
- Build your technical base
- Represent the Firm in a professional manner
- Develop client service and communication skills
- Focus on the CPA exam

The Associate role is the starting point of your career, in the Firm and in the public accounting profession.

As an Associate, you’ll participate in both classroom and in-the-field training, where you will learn fundamental technical accounting skills, auditing standards, team communication and client service standards. This is a time for you to gain an in-depth understanding of what our Firm does and your role in assisting your teammates. You’ll have the opportunity to work with various engagement teams to assist in service to clients; your engagement team and performance manager will coach you to improve and develop professionally. As an Associate, your professional focus will be on developing your technical, project management and communication skills, as well as earning your professional credentials as a certified public accountant. Associates should be actively studying for and passing a minimum of two sections of the CPA exam.

The Associate role is important to the Firm; you are the engine that allows other members of the team to focus on the specific technical issues that require client and/or industry knowledge. The time that you spend as an Associate is critical to your professional development — this is when you will begin to develop the professional habits that will help or hinder you for the rest of your career, including self-study, communications protocol, workpaper technique, time management, and issue assessment and resolution.

### How will you recognize when you’ve mastered the Associate role?

At SSF, a successful Associate demonstrates exemplary professional behavior and good interpersonal and communication skills with team members and clients alike. They have a committed dedication to learn, improve, apply and retain technical skills and an overt eagerness to work on new tasks and areas that lead to continued technical and professional development.

“ I think SSF brings a really unique culture to the public accounting mix.”

# EXPERIENCED ASSOCIATE

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TIMELINE → 1 to 2 Years

## EXPERIENCED ASSOCIATE

- Handle increasingly challenging technical projects
- Provide direction to less experienced staff
- Identify client service and engagement efficiency opportunities
- Lead smaller engagements
- Focus on the CPA exam

Once you have successfully transitioned from student to client service professional, you will earn your first promotion to Experienced Associate (EA).

You now have the opportunity to make a greater impact on your engagement teams as you take on more technically challenging assignments and as you serve as a role model and example for less experienced Associates. At this point, you should be well on your way to earning your professional credentials as a certified public accountant; the Firm's expectation is that an Experienced Associate should sit for at least two CPA exam parts per year until you have successfully completed the full CPA exam.

As an Experienced Associate, you will continue to provide your team with the support necessary to complete assignments in an efficient manner as you take on a larger role in the training, development and supervision of less experienced staff. In this process, you will begin to fine-tune your communication and work management skills in preparation for the Senior Associate role. You will also begin to deepen your technical skills in both formal and on-the-job training. Each level of the Firm has a specific role in our collective business development efforts. You should regularly identify opportunities to improve our internal procedures and processes with your engagement Seniors and Managers, with an eye towards improving client service and engagement efficiency. You should also be exploring your participation in various professional events and affiliations as you begin to network with other professionals outside of SSF.

### How will you recognize when you've mastered the Experienced Associate role?

At SSF, a successful Experienced Associate demonstrates exemplary communication and technical skills; you will have built strong working relationships with your teams and clients, have a maturing knowledge of most technical areas and can successfully lead a small engagement.



“SSF is focused on my career development and goals.”

# SENIOR ASSOCIATE

TIMELINE → 1 to 2 Years

## SENIOR ASSOCIATE

- Work closely and directly with clients
- Supervise multiple client assignments simultaneously
- Communicate effectively with all team members
- Develop technical expertise
- Coach and develop other professional staff
- Complete the CPA exam

The time you spend as a Senior Associate (Senior) at SSF is a key period in your career.

The promotion to Senior signifies that you have successfully built a solid foundation for your future growth as a public accountant. As a Senior, you are the cornerstone of our client engagement teams. While ensuring client satisfaction and appropriate execution of engagement plans, you are the coach and advisor to your team members and the switchboard through which most engagement communication must travel. It is your role to ensure that information is transferred efficiently and appropriately. In this role, you must develop and demonstrate deep knowledge of the technical issues and their application in your discipline. During your time as a Senior, you will complete all parts of the CPA exam pursuant to earning your professional credentials as a certified public accountant.

You will be working more closely and consistently with your clients than at any other level within the Firm. As such, you should be actively listening to and processing client information with an eye towards identifying additional service opportunities that will help your clients be more efficient in order to operate and grow their businesses.

### How will you know when you've mastered the Senior role?

You will be ready to move on to the role of an Experienced Senior when you can successfully supervise several client assignments simultaneously, can coach and develop other professional staff, and have made visible progress to passing all parts of the CPA exam.



# EXPERIENCED SENIOR ASSOCIATE

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TIMELINE —→ 1 to 2 Years

## EXPERIENCED SENIOR ASSOCIATE

- Practice growth
- Manage engagements
- Specialized expertise
- Coach and develop others
- Passed all parts of CPA exam

The Experienced Senior role is a point in your career where you are fine-tuning the engagement management skills learned as a Senior.

You are responsible for planning, monitoring and completing several engagements simultaneously in addition to taking on a stronger leadership role in the Firm. In order to be eligible for promotion to Manager, Experienced Seniors must have received their California CPA license number.

The Experienced Senior is successfully taking on larger and more complex engagements and is also a developing specialized technical expertise in one or more areas/industries. You are responsible for implementing solutions as well as actively identifying areas the Firm should be expanding services and providing additional value to each of your current clients. You are also expected to contribute to the learning and development of less experienced staff through mentorship and participation in technical in-house trainings.

At this point in your career, practice growth is becoming a more prominent part of your contribution to the Firm.

This includes both the identification of service expansion at existing clients and the continued expansion and active maintenance of your external professional network, paving the way for future business development opportunities.

**How will you know when you've mastered the Experienced Senior role?**

As an Experienced Senior, you will be ready to move on to the role of Manager when you are a fully accredited CPA, when you can successfully supervise several large, complex client assignments simultaneously, serve as a technical expert in your niche and demonstrate active efforts towards contributing to the Firm's business development efforts.

“ What makes me want to come to work every day is the people.”

“We recognize how important it is to surround ourselves with smart people.”



# MANAGER

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TIMELINE —→ 3+ Years

## MANAGER

- Ensure efficient execution of client engagements
- Leader in your chosen area of specialization
- Mentor and cultivator of other professional staff
- Actively expanding your business development activities
- Develop and implement Firm-wide initiatives

Sensiba San Filippo’s Managers are responsible for much of the leadership within our Firm.

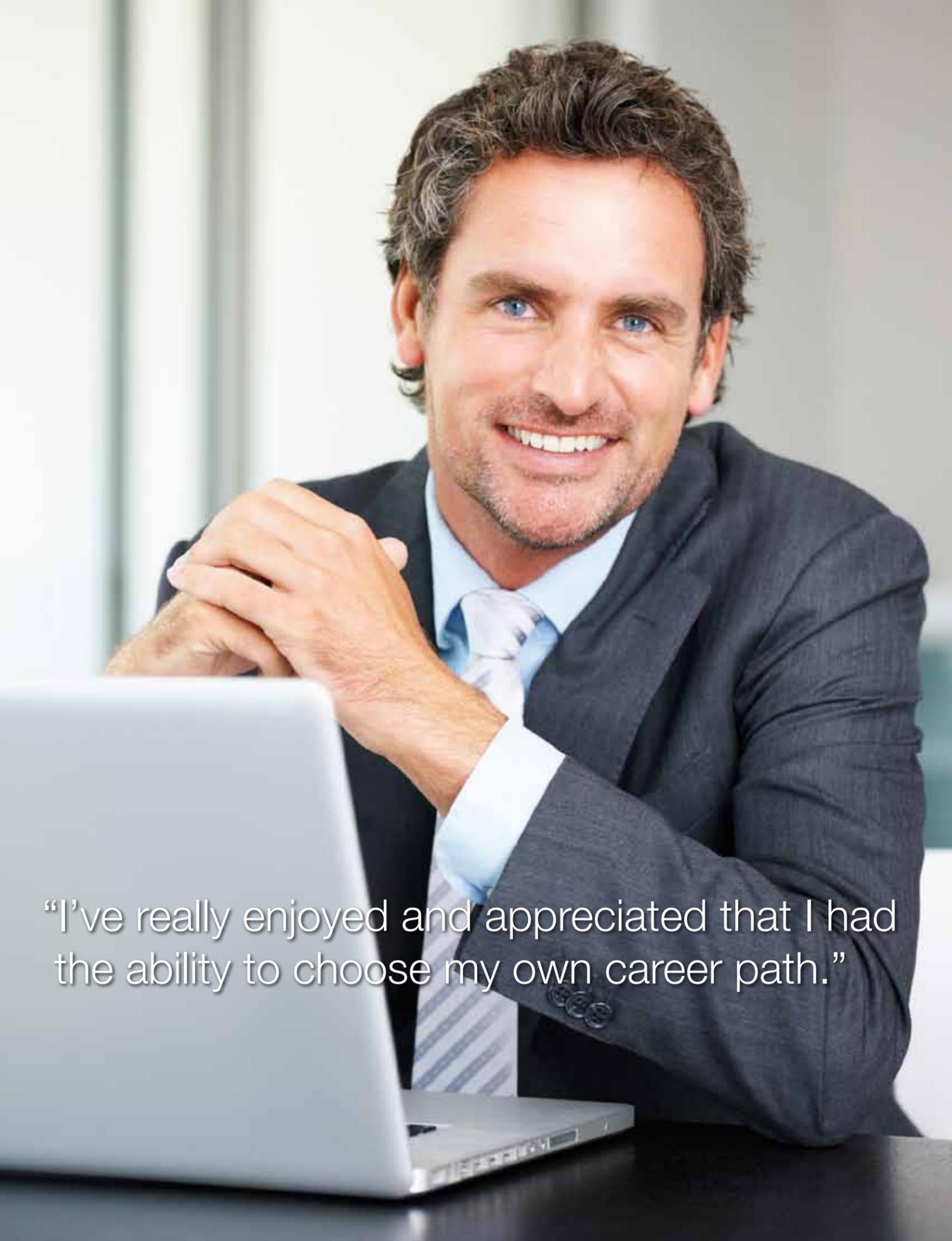
You will manage client assignments, serve as teachers and mentors to staff members and contribute to the conception and execution of Firm initiatives as well as to the business development efforts of the Firm. All Managers are licensed certified public accountants or equivalent licensed professionals in the legal field and actively pursue self-development opportunities while remaining current on required continuing professional education.

Managers are responsible for maintaining ownership of client assignments including the coaching, advising and supporting of team members while meeting client service expectations. Key technical issues are identified and vetted in detail at this level, and as a Manager you will have primary responsibility for ensuring that your clients understand the complete picture of their accounting, tax and business issues. You will build, direct and maintain empowered teams. You will anticipate issues, plan for their resolution and ensure appropriate and timely execution against the plan. You will manage engagement budgets and identify client needs and opportunities to better serve our clients. You will develop more efficient job processes and expanded services utilizing the talents of other SSF (or external, where appropriate) specialists. As Manager, you also play a key role in the development and implementation of Firm-wide initiatives and are seen as a leader in your chosen area of specialization.

While your primary role is to facilitate and enable the efficient execution of client engagements, you will also be expected to actively manage a network of professional peers whose talents and services are relevant to your client base. Additionally, you will begin to actively mine these relationships for new business opportunities.

**How will you know when you’ve mastered the Manager role?**

As a Manager, you will be ready to move on to the role of Senior Manager when you are a proven leader of the Firm; you play a significant role in the Firm’s business development efforts, you have a solid record of exceeding client expectations and you successfully mentor and cultivate talent within the Firm. Your promotion from Manager to Senior Manager also hinges on a demonstrated desire and ability to enter into the Firm’s partnership.



“I’ve really enjoyed and appreciated that I had the ability to choose my own career path.”

# SENIOR MANAGER

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TIMELINE —→ 3+ Years

## SENIOR MANAGER

- A leader in the Firm and the Profession
- You ensure client satisfaction and loyalty
- Key contributor to the Firm’s business development efforts
- Coach and mentor

As a Senior Manager, you are a proven leader at Sensiba San Filippo.

You are responsible for leading a profitable and functional practice by motivating and ensuring that team members are developing professionally and contributing productively to the client service and growth efforts of the Firm. You ensure exceptional client service through setting an excellent example for team members, and you actively participate in the growth of the Firm by identifying and actively and consistently attracting new clients. You actively pursue self development opportunities while remaining current on your required continuing professional education. You are a technical leader in your chosen area of specialization and participate in internal or external initiatives and development opportunities that relate to your specialty area.

A Senior Manager develops solutions for clients while maintaining empowered engagement teams to assist in the delivery of these solutions. You will develop and nurture long-term relationships with your clients’ senior management, significantly contribute to Firm business development efforts, support the Partner team in identifying areas for enhancement of the Firm and serve as a mentor and role model to staff and less experienced Managers.

**How will you recognize when you have mastered the Senior Manager role?**

You will be ready to move forward to Partner when you are not only a proven leader in the Firm, but are a proven leader in the public accounting profession. You must be a technical expert, demonstrate proven client satisfaction and loyalty, have a strong affinity for and success in business development and successfully mentor and develop talent.

# PARTNER

## PARTNER

- **Leader of the Firm and the Profession**
- **Key contributor to client success**
- **Focused on business development and Firm growth**
- **Ensure client service quality**
- **Develop and inspire high performing, loyal teams**

**Congratulations — as a Partner, you are now an owner of the Firm.**

Alongside your fellow Partners, your focus is on increasing the Firm's market share through active and consistent business development, ensuring the quality of the Firm's services, and inspiring and developing high performing teams. Your leadership and the example you set in our specialty practice groups will define the success or failure of those groups, and while you may have an area of technical expertise, your overall role is to promote a seamless integration of Firm services to our clients, contributing to their success.

Being a Partner means dedication and a personal drive to be the best of our profession. It means that you are seen as a leader able to inspire both client and staff loyalty for the long term. This personal drive to be the best and your strong business sense will propel the Firm forward with endless possibilities for growth.

“I’ve been so fortunate to have had mentors here that have been so supportive.”

When you join our Firm,  
we're behind you all the way.

You

Us



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