

# YOUR PATH to becoming an SSF ROCKSTAR



SSF

SENSIBA SAN FILIPPO

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 dedication of our team.

As an important member of this team, the Firm is committed to your professional growth. 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 like to think of our career ladder as more of a lattice, which allows for both vertical and lateral movement between jobs and skills that make up a career.

SSF's career lattice is about identifying new opportunities, broadening skill sets and making new connections that will help you take advantage of opportunities when they arise.

To begin building **your** career lattice, read on as these ideas can help you get started:

**Align yourself with a mentor.** Mentors can be anyone in the firm who is excited about investing in your professional development and supporting you in your lateral and vertical moves.

**Take steps to grow.** Volunteer for projects - big and small. By taking on new and more advanced tasks, you discover your passions and strengths; you begin to build your lattice.

**Share with others.** If you're knowledgeable about a topic that can benefit others, don't be afraid to offer your expertise. Offer to conduct a CPE presentation. Ask your manager or partner about leading a lunch & learn on a topic that you're excited about.

**Expand your horizons.** Look for opportunities to speak at conferences. You can discuss topics you are passionate about, while meeting new people with similar interests and discovering new resources and opportunities for the firm.

At SSF we empower you to determine **your** career path.

We prepared this guide to provide you with an overview of how your client service career can unfold at SSF, and how your individual skillset and talents contribute to the combined efforts of the Firm. Your own path to success will require dedication and a passion for excellent client service — a passion to be the very best. While these basic "levels" are traditional, each individual lattice may look different. We are so excited that you are here, and we look forward to working with you to build a rewarding career filled with fun, challenging work, financial success, and life-long relationships.



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

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# ASSOCIATE



**The Associate role is the starting point in your career, the Firm and the profession.**

As an Associate, your role is absolutely vital to the Firm as you support other team members on the engagement and gain specific client and industry knowledge. You participate in both classroom and on-the-job training, where you learn fundamental technical accounting skills, auditing and client service standards, as well as team communication. This is when you will begin to gain an in-depth understanding of what our Firm does and how you play a major role in assisting your teammates. You have the opportunity to work with various engagement teams to assist clients. Your engagement team and performance manager will coach you to improve and develop professionally. As an Associate, your professional focus is on developing your technical, project management and communication skills, as well as earning your professional credentials as a certified public accountant. Associates should actively study for and pass a minimum of two sections of the CPA exam.

You are the engine that allows other members of the team to focus on specific technical issues that require client and/or industry knowledge. The time spent as an Associate is critical to your professional development — this is when you begin to develop the professional habits that will help you for the rest of your career, including self-study, communication, professionalism, work paper technique, time management, and issue assessment and resolution.

## How will you know when you have mastered the Associate role?

As a successful SSF Associate, you will demonstrate exemplary professional behavior and solid interpersonal and communication skills with team members and clients alike. You will demonstrate a strong commitment to learn, improve, apply and retain technical skills and display an overt eagerness to work on new tasks and areas that lead to continued technical and professional development.

# EXPERIENCED ASSOCIATE



**Once you have transitioned from student to client service professional, you will be promoted 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 serve as a role model for less experienced Associates. At this point, you should be well on your way to earning your professional credentials as a certified public accountant or other equivalent credential. In fact, it is expected that an Experienced Associate sit for at least three CPA exam sections per year until the entire CPA exam has been passed. The pressure is on, but the reward is great!

As an Experienced Associate, you 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 begin to fine-tune your internal and client communication and project management skills in preparation for the Senior Associate role. You also begin to deepen your technical skills by participating in formal and on-the-job training. Every level of the Firm has a specific role in our collective business development efforts. You should regularly identify opportunities to improve internal procedures and processes with your Seniors and Managers, with the goal of improving client service and engagement efficiency. You should also explore participation in various professional events and affiliations as you begin to network with other professionals outside of SSF.

## How will you know when you have mastered the Experienced Associate role?

As a successful Experienced Associate you demonstrate exemplary communication and technical skills; you have built strong working relationships with your teams and clients, have a maturing knowledge of most technical areas and are able to successfully lead a small engagement.



# SENIOR ASSOCIATE



**The time you spend as a Senior Associate (Senior) 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 conduit through which most communication must travel. It is your role to ensure that information is transferred efficiently and appropriately. In this role, you develop and demonstrate deep knowledge of the technical issues and their application in your chosen discipline(s). You also help manage engagement economics, bringing potential change orders to the attention of clients, your manager, and your partner. 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.

As a Senior, you work more closely and consistently with your clients than at any other level within the Firm. As such, you should be actively listening and processing client information with an eye towards identifying additional service opportunities that will help your clients become more efficient in the way they operate and grow their businesses. You also help manage the expectations of the Managers, Partners, and clients of the timing of engagement projects and coordinate with team members to adjust for any schedule changes.

## **How will you know when you have mastered the Senior role?**

You are ready to move on to the role of an Experienced Senior when you can supervise several client assignments simultaneously, successfully coach and develop other professional staff, and have passed all parts of the CPA exam or other equivalent certification requirements. Senior Associates may not proceed to the Experienced Senior role until all parts of the exam are passed.

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**“Never do I ever feel lonely or unsupported both in my professional and personal life.”**

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# EXPERIENCED SENIOR ASSOCIATE



**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 within the Firm.

As an Experienced Senior, you successfully tackle larger and more complex engagements and develop specialized technical expertise in one or more areas/industries. You are responsible for implementing solutions, as well as actively identifying areas in which the Firm should be expanding services and providing additional value to each client served. You are also expected to define and manage project economics, participate in discussions with clients about change orders, contribute to the learning and development of less experienced staff through mentorship, and actively participate 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 for existing clients and the continued growth and active maintenance of your external professional network, paving the way for future business development opportunities. You contribute to external content, such as composing articles for your niche, school, or conference presentations, and other extracurricular participation within the Firm.

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

As an Experienced Senior, you are ready to move on to the role of Manager when you are a fully accredited CPA, JD or Enrolled Agent, and when you can successfully supervise several large, complex client assignments simultaneously, serve as a technical expert in your chosen niche(s) and are actively and consistently contributing to the Firm's business development efforts.



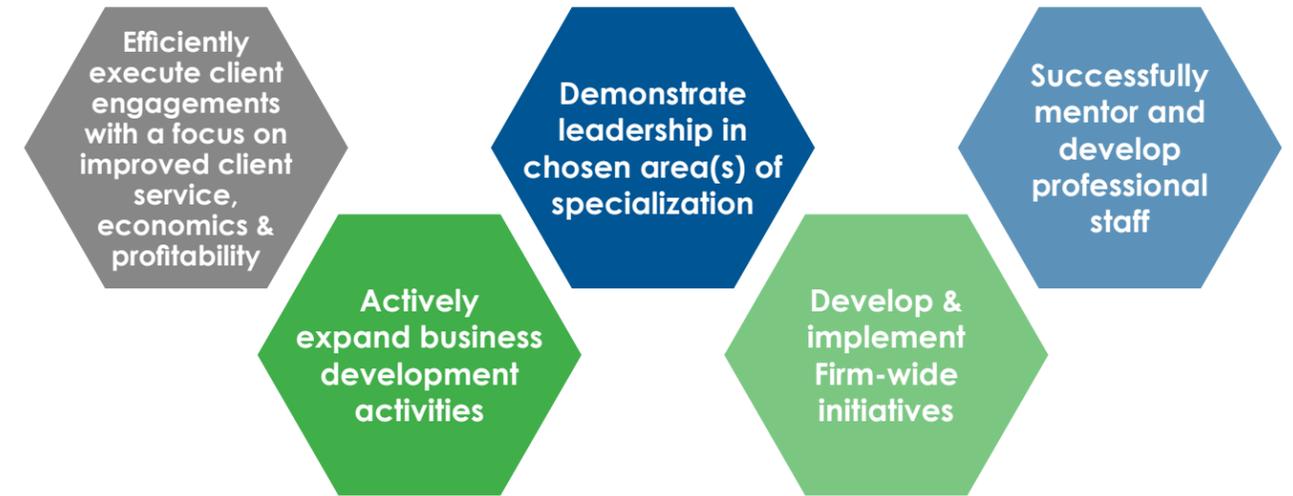
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**“What makes me want to come to work every day is the people.”**

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# MANAGER



## SSF's Managers are responsible for much of the leadership within our Firm.

As a Manager, you take ownership of client assignments, serve as a teacher, mentor staff members and contribute to the conception and execution of Firm initiatives as well as to the business development efforts of the Firm. Managers are licensed CPAs or equivalent licensed professionals (JD, Enrolled Agent). As a Manager, you actively pursue self-development opportunities while remaining current on required continuing professional education.

Managers are responsible for meeting client service expectations. Key technical issues are identified and vetted in detail at this level, and you have primary responsibility for ensuring that clients understand the complete scope of their accounting, tax and business issues. You build, direct and maintain empowered teams. You anticipate issues, plan for their resolution and ensure appropriate and timely execution against the plan. You manage engagement budgets, communicate change orders with clients and secure written approval. You identify client needs and opportunities to better serve our clients. You develop more efficient job processes and expanded services utilizing the talents of other SSF (or external, where appropriate) specialists. As a Manager, you play a key role in the development and implementation of Firm-wide initiatives and are viewed as a leader in your chosen area(s) of specialization.

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

## How will you know when you have mastered the Manager role?

You are 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 and consistently cultivate a high performance team. Your promotion from Manager to Senior Manager also hinges upon a demonstrated desire and ability to enter into the Firm's partnership.

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

# SENIOR MANAGER



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

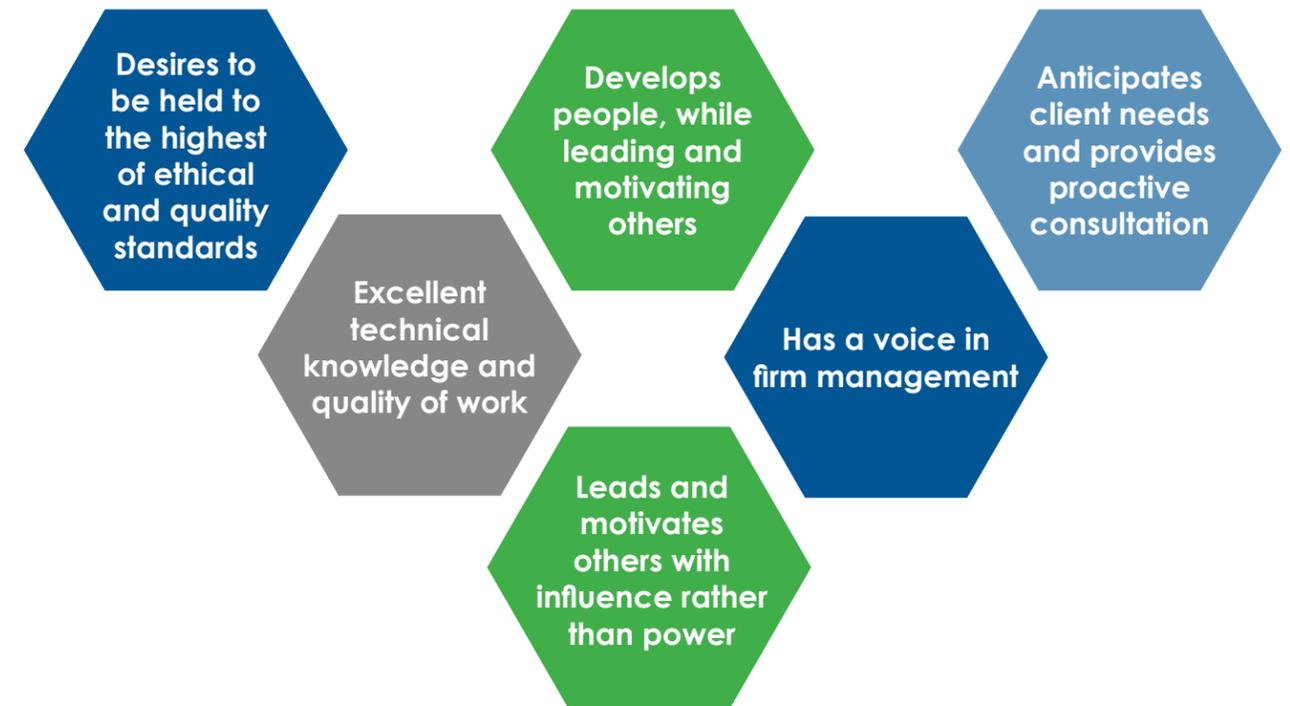
You are responsible for leading a profitable and functional practice. You ensure exceptional client service by setting a positive example for team members and by actively participating in the growth of the Firm by identifying and consistently attracting and serving new clients. You pursue self-development opportunities while remaining current on required continuing professional education. You are a technical leader in your chosen area(s) of specialization and participate in internal and external initiatives that relate to and elevate your specialty area(s).

As a Senior Manager, you develop solutions for clients while maintaining empowered and motivated teams that assist in the delivery of these solutions. You develop and nurture long-term relationships with clients' senior management, significantly contribute to the business development efforts of the Firm, support the Partners in identifying ways to benefit, enhance and grow the Firm and serve as a mentor and role model to staff and less experienced Managers.

## How will you know when you have mastered the Senior Manager role?

You are ready to become a Partner when you are not only a proven leader within the Firm, but are a proven leader in the public accounting profession and in your chosen niche(s). You have the willingness to proactively manage Firm risks while consistently providing exceptional solutions to problems. You must be a technical expert, maintain a high level of client satisfaction and loyalty, have a strong affinity for and success in business development and consistently inspire, develop and maintain high-performing teams. Senior Managers moving to the Partner role will have completed a Partner-in-Training program.

# DIRECTOR



## As a Director, you are a valued member of the leadership team.

Many valuable, high-performing employees don't necessarily want the buy-in, commitment or liability that comes with being a Partner. This is why we created the Director career path. We believe that by offering flexibility in our roles, we will retain the highest caliber of talent as well as maximize our employees' career satisfaction.

Whether you're leading a Marketing or Finance team or a specialized niche, serving clients or staff, our Director path will afford you every opportunity to develop your craft and excel in your career.

Directors at SSF are subject matter experts, with relevant certifications in their areas of expertise or chosen specialization. They may focus on delivering impact with clients, developing people and/or growing services, depending upon their individual skill-set and aspirations. Regardless of their chosen focus area, Directors are leaders who are highly skilled in their field and have the capacity and desire to take our firm and services to the next level.

No matter where you are or what you've accomplished during your career, whatever lies ahead will be unique to you. Rather than a one-size-fits-all approach to planning your future, Sensiba San Filippo empowers you to personalize a career plan in the way that balances your individual strengths and passions with the strategies of the firm.

Please reach out to your performance manager or the Director of Human Resources for more details.

# PARTNER



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

Alongside your fellow Partners, your focus is on increasing the Firm's market share through active business development, ensuring the quality of the Firm's services, and developing high performing teams. Your leadership and the example you set in your specialty practice group will define the success or failure of the group. While you have one or more areas of deep technical expertise, your primary role is to promote a seamless delivery of Firm services to our clients, contributing to their success. Additionally, you strive to find ways to better serve our community while building strong relationships within the business community.

Being a Partner means that you have demonstrated the dedication and personal drive to be the best in our profession. It means that you have credibility as a leader who inspires both client and staff loyalty for the long term. This personal drive to be the best coupled with strong business acumen and leadership skills propel the Firm forward with endless possibilities for growth.



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

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# Family. Community. Firm.

(In that order.)

From giving back to our communities to working together with integrity and respect, SSF is passionate about a value rich culture.

Come check us out and see how you can fit right in!

[www.ssflp.com/careers](http://www.ssflp.com/careers)

