



**CREATIVE
PLANNING**

Title: **Audit Manager – Quality of Earnings (QoE)**

Location: Any Location/ Hybrid/ Remote

JOB SUMMARY

The Creative Planning Audit Manager serves clients as a member of BerganKDV*. The Audit Manager specializing in Quality of Earnings leads and manages end-to-end QoE engagements, including planning, execution, and reporting. This position plays a key role in supervising QoE engagements, ensuring technical excellence, on-time delivery, and strong client service. The Manager focuses on leading staff and seniors on compliance and advisory work, reviewing deliverables, resolving routine technical issues and identifying areas for process improvement while being a leader in the firm. The Audit Manager collaborates with Directors and Managing Directors to ensure the seamless execution of firm goals in quality, client service, operational efficiency, growth, and culture.

JOB DUTIES

- Effectively manage client relationships and expectations throughout the engagement and beyond to build the referral pipeline
- Stay updated on transaction advisory and due diligence practices, ethical standards, and other industry best practices to mentor and train the team
- Ensure compliance with the firm's quality control policies, professional standards, internal policies, and regulatory requirements
- Serve as a primary point of contact for routine client questions, coordinate timely responses, and keep them informed of progress and deadlines
- Develop a reputation with clients for reliability, responsiveness, and technical competence
- Prepare and review client-ready deliverables, including detailed QoE reports and executive summaries
- Analyze financial statements and key performance indicators to assess earnings quality, revenue recognition, working capital trends, and other financial metrics
- Identify and quantify EBITDA adjustments, non-recurring items, and pro forma impacts
- Engage in client discussions about strategic business topics, proactively recommend risk mitigation tactics and improvements
- Collaborate with clients, targets, and cross-functional teams (e.g., tax, valuation, legal) throughout the diligence process
- Coordinate with seniors and staff to lead, assign and supervise work to ensure client deliverables are accurate, timely, and meet expectations
- Use software and tools effectively and ensure staff compliance with processes.
- Monitor engagement budgets and highlight issues early
- Demonstrate timeliness and complete knowledge of firm policies on financial matters: billing, accounts receivable, budgets, time reporting, engagement, and profitability
- Support the growth and professional development of yourself and your teammates by participating in company-sponsored trainings, CPE courses, internal committees, mentorship opportunities, and collaborative reviews

- Support business development efforts, including proposal writing, scoping, and client presentations
- Model Creative Planning values
- Provide and ensure open communication with all team members to promote a positive learning environment that focuses on trust, transparency, and accountability

REQUIRED EXPERIENCE / QUALIFICATIONS

- Active CPA Certification
- A bachelor's degree in accounting or related degree
- 5 years of transaction advisory relevant experience, deal advisory, private equity, or financial due diligence experience strongly preferred

TECHNICAL SKILLS

- History of preparing and reviewing QoE engagements while meeting quality standards
- Solid technical skills in a matter relevant to mid-market businesses
- Proficient in Microsoft Office Suite
- Familiarity with various software, project management tools, and emerging technologies
- Excellent written and verbal communication skills
- Integrity, dependability, a positive attitude and a strong work ethic

Salary Range: \$130,000 - \$150,000

**Creative Planning, LLC is an independent wealth management firm, whose affiliates also provide business consulting, tax, financial, and other professional services to clients. Creative Planning and its affiliates lease employees and other resources to BerganKDV, an independent, separately governed, and licensed CPA firm, in support of audit and attest services BerganKDV provides to its clients.*

