STE FINANCIAL · ST360 POSITION DESCRIPTION

Position description

Tax agent / Accountant

The character, craft and mindset of the person we want to bring onto the team, broken into the core profiles we hire against.

ROLE	REPORTS TO	TEAM SIZE	TYPE	BASED
Tax agent / Accountant	**Partners**	5 people	**Part time**	**Tweed Coast**

The opportunity

Who we are, and what this person steps into

STE Financial was born in 2020 from a simple observation: most business owners spend too much time bogged down in bookkeeping and not enough time planning for the future. Founders Mark Moore, a licensed mortgage broker, and Craig Hughes, a CPA, cover both sides of the picture, so advice on the books and advice on the finance come from the same two heads. They built a firm that does more than just keep score. We help clients understand the story their numbers are telling, plan ahead, and make confident calls for their business.

This isn't your average accounting firm. We're a small, tight-knit team based on the beautiful Tweed Coast, and our values (being approachable, thorough and genuinely invested) are at the heart of everything we do. We bring personality and fun to the numbers, using proven systems to deliver accurate, insightful advice.

You'll join a team that treats each client's business as its own and offers a rare blend of accounting and lending expertise: a truly holistic service. This is a chance to move beyond compliance and become a trusted advisor, with direct mentorship from the partners and a real say in how we grow. We're a flexible firm that values a genuine work-life balance, set for growth, and this role grows with us.

> **STE Financial exists to simplify, transform and empower: our team, our clients, and ourselves.**

01 Core values & traits

The character we hire for

- **Commercial curiosity.** A desire to look beyond spreadsheets to understand the 'why' behind the numbers, helping clients translate data into actionable business strategies.
- **Approachable professionalism.** A warm, personable demeanour that breaks the 'stuffy accountant' stereotype, ensuring clients feel comfortable and empowered rather than overwhelmed.
- **Proactive ownership.** A self-starter mindset suited to a tight-knit team, treating every client's business with the same care and meticulous attention to detail as if it were your own.

- **Adaptable growth mindset.** An enthusiastic attitude towards evolving systems and a fast-paced environment, with a genuine interest in personal development and firm-wide innovation.
- **High-integrity collaboration.** A thorough and reliable team player who values transparency, contributes to a positive workplace culture, and prioritises a healthy work-life balance.

02 Technical skills

What they can do, day one

- Advanced proficiency in **Xero** and its integrated app ecosystem, to drive process efficiency and cloud-based collaboration.
- Strong competency preparing complex Financial Statements, Business Activity Statements (BAS) and Income Tax Returns for diverse entity structures.
- Demonstrated ability in management accounting, including three-way cash flow forecasts and bespoke KPI reporting suites.
- Solid understanding of Australian taxation legislation, including FBT, CGT concessions and Division 7A, to support proactive advisory.
- Experience with workflow management software to maintain rigorous quality control and thorough documentation standards.

03 Soft skills

How they work with people

- A proactive, empathetic communicator who translates complex financial data into meaningful stories that empower and reassure small business owners.
- A natural relationship-builder who thrives in a collaborative, tight-knit team and treats every client's business with the same care as their own.
- A growth-oriented mindset with the adaptability to balance high-level advisory work with the precision required for thorough compliance.
- An approachable personality that aligns with a 'personality-first' culture, bringing energy and fun to the workplace while keeping professional integrity.
- Strong emotional intelligence and active listening to serve as a trusted advisor, spotting opportunities to simplify and transform client operations.

04 Work style & culture fit

How they show up

- Builds genuine, approachable rapport with clients, moving beyond a transactional 'compliance' focus to become a trusted advisor who empowers owners.
- A proactive, inquisitive analytical style that identifies the 'story' behind the numbers to offer insightful advice rather than just keeping score.

- Thrives in a small, tight-knit team, willing to bring personality and fun to the workplace while keeping a thorough, accurate work ethic.
- A flexible, growth-oriented mindset, comfortable with evolving systems as the firm scales and integrates both accounting and lending expertise.
- Values a holistic approach to client service, treating each client's business with the same level of care and personal investment as if it were their own.

WORK-LIFE BALANCE, FOR REAL

We want someone who values work-life balance as much as the partners do, which is exactly why we care about being efficient: we work smart so we can get home to our families at a reasonable hour and properly switch off. We are firm believers in a coffee in the morning and a beer in the afternoon. Some days, both.

05 Motivators & growth drivers

What keeps them here and growing

- Seeking a move from traditional compliance-heavy roles to a 'trusted advisor' model, where interpreting the narrative behind the numbers is the main focus.
- Driven by direct mentorship from the founders and a desire to influence the operational growth and strategic direction of a boutique firm.
- Motivated by holistic professional development that integrates both accounting and lending expertise to provide comprehensive client solutions.
- Values a genuine work-life balance and a high-trust, flexible environment over the rigid corporate structures of larger firms.
- Energised by building long-term, personable relationships where success is measured by client empowerment, not just billable hours.

06 Red flags & deal-breakers

What rules a candidate out

- A 'compliance-only' mindset that lacks the desire to act as a proactive advisor or interpret the story behind the numbers for clients.
- Resistance to modern cloud-based accounting systems, or a preference for rigid, traditional corporate hierarchies that conflict with a small, agile team.
- A clinical or overly formal communication style that fails to align with the firm's approachable, personality-driven and fun culture.
- A lack of 'ownership' mentality: a reluctance to treat client businesses as their own, or a tendency to work in silos rather than collaboratively.
- Inflexibility around work-life balance: a pattern of 'presenteeism', or an inability to manage outputs autonomously without constant supervision.