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# Example of Advisory Services Job Description

Our growing company is searching for experienced candidates for the position of advisory services. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for advisory services

* Review each relationship to ensure compliance with trust terms, proper fee allocation, proper documentation
* Review operational, financial, and technology processes to provide management with an individual assessment of business risk, internal control, and the overall effectiveness and efficiency of the process the risks associated with Sarbanes Oxley as it pertains to internal controls
* Receive and respond to client requests, service as the liaison between clients and the company
* Demonstrates expertise and leadership in consultative core competencies such as executive presentation development/delivery, change management, facilitation
* Communicate effectively (written and verbal) to a variety of audiences
* Adheres to all company policies and procedures including, but not limited to those identified within the Standards of Business Conduct and the Colleague Handbook, as may be amended from time to time
* Provides supervision, training, motivation and professional development of staff to ensure high quality output and efficiency in the department
* Autonomy - Using established procedures and working under general supervision, performs assigned tasks
* Communicate effectively and professionally with all levels of client personnel and client service personnel
* Collaborate with colleagues to recommend most cost­-effective ways to complete tasks

## Qualifications for advisory services

* Plan, execute, direct and complete analysis of historical financial statements to identify sustainable earnings for a variety of industries, including manufacturing, distribution, hospitality, high-technology, and healthcare
* Effectively review/write engagement reports and other deliverables to client management
* Monitor progress of engagements, manage risk, and keep key stakeholders informed of key findings and expected timetables
* CPA and other relevant professional certifications a plus
* Seven plus years of progressive transaction services experience in public accounting or equivalent environment delivering and managing projects
* Ability to work additional hours as needed and travel out-of-town as required