

### **CAS Manager:**

The Watermark Group is seeking an experienced and motivated CAS Manager to lead our Client Accounting Services team. This role involves managing client relationships, overseeing service delivery, and guiding a small team of accountants. You'll deliver customized accounting solutions, ensure accurate and timely financial reporting, and drive accounting operation efficiencies—giving our clients the freedom to focus on growing their businesses.

### **Who Is Watermark?**

Founded in 2006, The Watermark Group helps clients align their goals, pursue their highest potential, and protect what matters most. We offer services in a variety of disciplines including accounting and assurance, tax, finances, ownership transition, wealth planning, family dynamics, and more. Our “Why” – **To Inspire Others** and our values—**Others First Focus, Entrepreneurial Spirit, and Passionate Conviction**—drive our culture and success.

### **Key Responsibilities:**

- **Client Management:**  
Serve as the main point of contact, ensuring exceptional service and proactive communication. Understand client goals and ensure timely, accurate delivery of services.
- **Team Leadership:**  
Supervise and mentor a small team of accountants. Delegate effectively and support professional development.
- **Accounting Oversight:**  
Review and prepare financial statements, general ledgers, and financial reports. Ensure accuracy in cash flow, reconciliations, bill pay, and month-end close. Handle billing with CAS team support.
- **Process Improvement:**  
Streamline operations, implement best practices, and collaborate cross-functionally to enhance service delivery.
- **Client Deliverables:**  
Ensure timely and accurate reporting, filings, and documentation. Manage deadlines and exceed expectations.
- **Strategic Support:**  
Develop tailored client strategies, support new service offerings, and assist in business development, including proposal preparation.

**Qualifications:**

- Bachelor's in Accounting, Finance, or related field (CPA preferred)
- 5+ years accounting experience, including 2+ in a managerial or supervisory role
- QuickBooks Online proficiency (Certified ProAdvisor preferred)
- Strong communication, analytical, and organizational skills
- Proficiency in Microsoft Office and Excel required
- General understanding of payroll processing and payroll tax returns
- Experience in public accounting or client-facing accounting services environment is a plus
- Ability to read and analyze financial statements

**What You Can Expect:**

- Supportive, team-focused work culture
- Opportunities for personal and professional growth
- Competitive compensation and benefits
- Hybrid schedule eligibility after the first year
- Community service opportunities
- Dream Manager & Dream Funding programs
- “Dress for Your Day” policy

**APPLY TODAY:**

If you're a proactive and results-oriented accounting professional with a passion for client service and team leadership, we encourage you to apply for this exciting opportunity to contribute to our growing firm. Please submit your resume to [Recruiting@thewatermarkgrp.com](mailto:Recruiting@thewatermarkgrp.com).