



Tax Manager

The Tax Manager will successfully review and manage staff deliverables concerning tax returns, extensions, tax planning calculations, and write-up work for all entity types (S and C corporations, partnership, fiduciary, non-profit, and gift). This position could be a part-time role with full-time hours during peak tax seasons (February to April and August to October).

Essential Duties and Responsibilities include:

- Prepare and review complex tax planning projections for individual and corporate estimated tax liability
- Prepare complex federal and state individual income, gift tax, and estate tax returns
- Conduct complex tax research and present findings and conclusions
- Respond to IRS and state agency audits, inquiries, and tax notices
- Communicate with IRS and clients in connection with audits, inquiries, and tax notices
- Delegate projects to staff and provide accounting and tax assistance as needed
- Communicate directly with existing clients, colleagues, management, and IRS representatives regarding various tax matters
- Lead department in knowledge of software, processes, and workflows
- Engage in consulting and special projects as requested by management and clients
- Evaluate internal controls related to assigned areas and suggest and implement improvements or enhancements as needed
- Manage preparation of client billings in a timely manner and manage client base AR collections
- Manage all administrative duties related to assigned client base including but not limited to: accuracy of scheduling database; review budget to actual reporting regularly to determine if any issues need to addresses and preparation of client billing
- Direct ongoing employee training and assist with training for new hires
- Seek opportunities for the firm to develop and grow future leaders, and participate in development and teaching of internal courses
- Take direction from and report to senior level management
- Keep the President/CEO informed of all important developments related to clients, sharing facts, conclusions, and recommendations

Supervisory Responsibilities

Regularly supervises two or more firm members. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities include interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

Qualifications

CPA certification required. Bachelor's degree in accounting or other major with tax and accounting coursework. Minimum of five years preparing and two years reviewing all types of tax returns with a public CPA firm or private company.

Computer Skills

To perform this job successfully, an individual should have knowledge of Quickbooks; Microsoft Outlook, Excel and Word. Knowledge of the following specialty software packages is highly desirable: ProSystem Tax; BNA Income Tax Planner and Depreciation Solutions, Visual Practice Management and the ability to learn other software packages as needed.

Personal Attributes

- Leadership and decision making ability
- Teamwork orientation
- Ability to think creatively
- Learns and adapts quickly to change; a problem solver
- Excels under pressure in a continuously changing, fast-paced environment
- Excellent written, verbal and interpersonal skills
- Action-oriented, exhibits sense of urgency in all work
- Ability to successfully multi-task in a fast-paced environment
- Internally driven to succeed, has a passion for the field and takes pride in work
- A detail-oriented self-starter with customer service orientation; takes initiative
- Maintains composure and a professional demeanor at all times; is a calming influence can diffuse high-tension situations comfortably; uses diplomacy and tact effectively
- Practices attentive and active listening
- Uses his/her time effectively and efficiently; values the time of others

Language Skills

Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one-on-one and small group situations to clients, and other employees of the organization.

Mathematical Skills

Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.

Reasoning Ability

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

Physical Demands The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this Job, the employee is regularly required to talk or hear. The employee is frequently required to sit; use hands to finger, handle, or feel and reach with hands and arms. The employee is occasionally required to stand; walk; climb or balance and stoop, kneel, crouch, or crawl. The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision and ability to adjust focus.

Work Environment The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The intent of this position description is to provide a representative summary of the major duties and responsibilities performed by incumbents of the position. Incumbents may be required to perform other job-related tasks other than those specifically presented in this description.