

TAX MANAGER

SUMMARY: The Tax Manager is responsible for the efficient, accurate, complete and timely preparation of client tax returns and tax research projects. Advanced technical skills in a variety of tax and accounting areas, along with well-developed and applied management supervisory skills are required.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Include the following, but are not limited to, and are required to perform this job successfully. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Performs technical tax review and approval of all tax returns and governmental tax examinations of any complexity.
- Assumes full responsibility for larger tax returns and delegates to the various tax preparers as deemed necessary.
- Conducts, delegates and/or manages tax research projects to achieve an accurate and efficient product.
- Participates actively in client meetings and tax planning efforts to assist the Auditing and Accounting Department with larger clients.
- Acts as a resource for tax preparers/specialists and A&A staff on specific tax issues and/or questions.
- Assumes tax preparation responsibility for the more complex business returns.
- Assumes client service responsibility for clients the tax manager works directly with or clients where the responsibility is delegated from the Director.
- Communicates to the appropriate firm personnel important tax developments affecting the firm's clients.
- Delegates and manages governmental tax examinations; may represent the client before the appropriate taxing authorities.
- Maintains familiarity with qualifications of all tax staff members; reviews staff assignments for appropriateness.
- Supervises tax staff and provides on-the-job training.
- Works to develop responsible, trained staff by assisting in recruiting, performance evaluations, developing training aids, and acting as an instructor in professional development programs.
- Assumes responsibility for smooth flow of tax returns through the tax preparation system to assure accurate, complete and timely preparation and delivery of all clients' tax returns.
- Possesses a complete knowledge of the firm's philosophy and its opinions on tax matters.
- Maintains a knowledge of general economic and political trends of possible tax or other legislation that could affect the business climate.

OTHER FUNCTIONS:

- Prepares other reports and projects as requested from time to time by the Directors.
- Participates in firm's practice development efforts through involvement with referral sources, community and industry activities.
- Performs such other duties as may be assigned.

REQUIRED EDUCATION and EXPERIENCE:

- Bachelor's Degree (B.S.) in Accounting from a four-year College or University.
- Minimum of seven (7) years experience in public accounting, demonstrating a proven progression in tax return complexity, scope and research.
- Minimum of two (2) years experience representing clients before taxing authorities.
- Minimum of one (1) year experience supervising and directing work of tax preparers.

REQUIRED CERTIFICATES, LICENSES, KNOWLEDGE or SKILL:

- Current and valid certified public accountant's license.
- Proficiency in use of computer tax preparation, tax research and tax planning software programs.