



Job Title: Tax Senior Manager
Department: Tax
Reports to: Partner
Status: Full-time or Part-time
Level: Exempt
Last Updated: 2020

Summary of Responsibilities:

A Tax Senior Manager is responsible for the efficient, accurate, complete, and timely preparation of all clients' tax returns. Advanced technical skills in a variety of tax and accounting areas, along with well-developed and applied management and supervisory skills are required. The Tax Senior Manager makes decisions on all but the most unusual tax situations, thus removing most partner involvement from client responsibility. The Tax Senior Manager has responsibility for business development, staff management and administrative functions.

Essential Functions:

- Performs technical tax review and approval of all assigned 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
- Delegates and manages tax research projects to achieve an accurate and efficient product
- Participates actively in client meetings and tax planning efforts
- Acts as a resource for tax preparers/specialists and auditing staff on specific tax issues and/or questions
- Assumes client service responsibility for clients the tax manager works directly with or clients where the responsibility is delegated from the partner
- Communicates to the appropriate firm personnel important tax and 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/develops/coaches team members as assigned
- Works to develop responsible, trained staff by assisting in recruiting, performance evaluations, developing training aids and acting as a coach 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
- Possess a complete knowledge of the firm's philosophy and its opinions on tax matters
- Maintains a knowledge of general economic and political trends and stays abreast of possible tax or other legislation that could affect the business climate



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- A basic familiarity with state and local tax issues that arise with small business clients; assists in responding to state and local audit inquiries and offers advice to clients on how to proceed upon notice of audit
- Responsible for billing out tax work and managing tax related accounts receivable for the firm
- Meets on a regular basis to ensure the workload is dispersed evenly
- Set individual goals that support departmental, industry and firm goals
- Establish leadership role in identified industry group and actively participate in business development opportunities
- Meet budget constraints and deadlines
- Leads/develops/coaches team members
- Perform other duties as assigned

Education, Experience, and Skills:

- Bachelor's degree in accounting from an accredited college or university
- Must have at least 5+ years experience in public accounting firm, with a concentration in tax.
- Partner potential for qualified candidates.
- Complete assigned CPE or professional development courses as required annually.
- Current and valid CPA license required.

Expectations:

- Respect and earn the respect of fellow team members.
- Take ownership of identified processes and responsibilities.
- Keep open communications with manager and partners.
- Perform work with confidence and pride, follow through to completion.
- Dependable.
- Make informed decisions – discuss with manager when needed.
- Grow and learn from past mistakes.
- Work in a safe, clean and employee friendly atmosphere.
- Work personal/professional development plan.
- Must have flexibility with work schedule.

Working Conditions:

- Local and overnight travel may be required.
- Overtime required during busy periods.

By signing below I acknowledge I have read and reviewed this job description and understand my job responsibilities:

Employee Signature and Date



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We are committed to providing equal employment opportunities to all employees and applicants without regard to race, ethnicity, religion, color, sex (including childbirth, breast feeding and related medical conditions), gender, gender identity or expression, sexual orientation, national origin, ancestry, citizenship status, uniform service member and veteran status, marital status, pregnancy, age, protected medical condition, genetic information, disability or any other protected status in accordance with all applicable federal, state and local laws.

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