

Title: Tax Manager
Classification: Exempt
Supervises: Accounting Services/Tax Staff

Summary of Responsibilities:

Tax Managers are responsible for managing multiple tax projects and client engagements simultaneously, and planning, supervising and reviewing engagement workflow. Managers develop and train staff and make associations to develop new business for the firm.

Essential Functions:

1. Responsible for assisting the engagement member in fulfilling tax functions, which require a high level of experience and judgment.
2. Maintains contact with clients throughout the year; possesses a thorough knowledge of the client and all facets of the client's business.
3. Plans, supervises and reviews engagements using firm policies and procedures.
4. Participates actively in client meetings and planning efforts.
5. Maintains familiarity with qualifications of all staff members; review staff assignments for appropriateness.
6. Adheres to engagement time budgets.
7. Supervises staff and provides on-the-job training; reviews work papers, tax returns and reports prepared by staff.
8. Anticipates problem areas of engagement and questions that will arise.
9. Keeps owner or engagement owner informed of all important developments on engagement; analyzes problems and recommends solutions.
10. Ensures that financial statements, tax returns, payroll and letters of recommendation are prepared in accordance with professional and firm standards.
11. Communicates progress of engagements, problems and resolutions to client.
12. Works to develop responsible, trained staff by assisting in performance evaluations.
13. Possesses a complete knowledge of the firm's operating philosophy and its culture.
14. Maintains knowledge of general economic and political trends of possible tax or accounting pronouncements or other legislation that could affect the business climate.

Other Functions:

1. Works to develop responsible, trained staff by assisting in recruiting, developing training aids, and participating in professional development programs.
2. Participate in firm's practice development efforts through involvement with referral sources, community and industry activities.
3. Prepares other reports and projects as requested from time to time by the owners.
4. Such other duties as may be assigned.

(Tax Manager continued)

Education, Experience and Skills Required:

1. Bachelor's or Master's degree in accounting with an overall GPA of 3.0.
2. At least five (5) years experience in public accounting, demonstrating a progression in complexity of engagements, scope, and number of engagements managed.
3. Possesses a superior working knowledge of GAAP, GAAS and tax law.
4. Demonstrated ability to bring new business to a CPA firm.
5. Minimum of twenty (20) hours of continuing professional education (CPE) is required each year, with one hundred twenty (120) hours of CPE required every three years.
6. Holds a current and valid certified CPA license.
7. Should be a member in good standing with the American Institute of Certified Public Accountants, or other appropriate certifying institute.
8. Proficiency in use of computers, accounting and tax software programs, spreadsheet software programs and calculator.
9. Ability to communicate clearly and concisely in English.
10. Ability to maintain client confidentiality.