



## **TAX SENIOR ACCOUNTANT**

**OBJECTIVE:** In fulfilling the Firm's mission, the Tax Senior Accountant performs the day-to-day tax and advisory services while working as a business advisory liaison with clients. Additionally, the Tax Senior Accountant handles tax engagements through reviewing client data, understanding legislative updates and preparing client tax returns. The Senior Accountant supports the Firm's goals and values through all professional communications and strong working relationships.

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### **RESPONSIBILITIES**

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#### **CLIENT SERVICE**

- Works on various tax returns (individuals, trusts, partnerships and corporations.) under direct supervision of a supervisor or designee (depending on the size of the engagement, the supervisor could be a Senior Accountant, Manager or Officer).
- Prepares tax returns and client data following the Firm policies and procedures.
- Reviews accounting data and financial statements working within budgets guidelines.
- Brings unusual/significant accounting and tax implications/questions to the supervisor.
- Becomes familiar with the Firm's policies, procedures, manuals, forms and relevant software.
- Assists other team members with client management such as gathering tax, research of tax problems, recommendations for business and process improvement.
- Continuous learner that develops job knowledge of client operations, processes, business objectives, as well as, federal and state tax issues.

#### **PEOPLE MANAGEMENT**

- May be responsible for supervising and training less experienced Staff Accountants.
- Acts as a mentor to entry level Staff Accountants on an informal basis.

#### **BUSINESS PROMOTION AND GROWTH**

- Understands key elements of client care and service.
- Develops understanding of all Firm services and marketing strategies.
- Participates in community activities; begins to establish external referral network.
- Develops verbal and written communication, as well as, interpersonal skills.

**DEPARTMENT ADMINISTRATION**

- Supports departmental goals, policies and guidelines; works within all applicable laws and regulatory processes.
- Assumes responsibilities as a "champion" in specific departmental software applications.
- Performs any other work assigned by a supervisor; also, participates in other administrative activities as requested by the Officers, Managers or Senior Accountants.

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**POSITION QUALIFICATIONS**

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EDUCATION	Bachelor's in Accounting or equivalent required
EXPERIENCE	Typically, 2+ years professional experience in public accounting
COMPETENCIES & LICENSES	<p>Actively pursuing CPA license, or currently possess CPA</p> <p>Proficient in use of computers and basic software applications</p> <p>Good written and verbal communication skills</p> <p>Successful problem-solving and analytical skills</p> <p>Ability to thrive in a team-oriented environment</p> <p>Excellent project management, analytical, and interpersonal skills.</p> <p>Strong time management skills, ability to meet deadlines</p>
KNOWLEDGE & SKILLS	<p>Professional appearance and demeanor, highly-motivated</p> <p>Client-focused, team-oriented work ethic, delivering high quality results</p> <p>Committed to integrity and ethical business standards</p> <p>Cooperative, flexible, ability to multi-task and complete assignments within time constraints and deadlines.</p> <p>Growth potential with opportunities for upward advancement</p> <p>Ability to work increased hours during seasonal periods.</p>
WORKING CONDITIONS	<p>Ability to sit and/or use a computer for extended periods of time. Ability to travel by air and car, if required.</p> <p>Ability to carry and transport bags, computers, etc.</p> <p>Ability to provide own transportation for traveling to client assignments and for personal development training</p> <p>Infrequently may out-of-town travel with overnight stay for engagement follow up, meetings, seminars, etc.</p> <p>Overtime work required periodically throughout year.</p> <p>Total hours generally range from 2,080-2,300, including PTO</p>

*PROPRIETARY AND CONFIDENTIAL TO PUGH CPAs*