



Tax Manager

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

RESPONSIBILITIES

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 another 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 and questions to the Manager or Officer.
- Performs any other work assigned by the Manager or Officer.
- Becomes familiar with the Firm's policies, procedures, manuals, forms and relevant software.
- Assist other team members with client management such as gathering tax, research of tax problems, recommendations for business and process improvement.
- Continuous learner developing job knowledge of client operations, processes, business objectives as well as federal and state tax issues.
- Other duties as assigned.

PEOPLE MANAGEMENT

- May be responsible for supervising and training less experienced Staff or Senior Accountants.
- Acts as a mentor to entry level Staff and/or 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 writing, communication, inter-personal and other human relation skills.
- Actively maintains CPA certification by completing all continuing professional education.

DEPARTMENT ADMINISTRATION

- Supports departmental goals, policies and guidelines.
- Assumes responsibilities as a "champion" in specific departmental software applications.
- Participates in other administrative activities as requested by the Officers, Managers, etc.

POSITION QUALIFICATIONS

| | |
|--|---|
| EDUCATION | Bachelor's in Accounting or equivalent required |
| EXPERIENCE | Typically, minimum 4+ years professional experience in public accounting |
| COMPETENCIES & LICENSES | <p>Active current CPA license</p> <p>Proficient in use of computers and basic software applications</p> <p>Strong 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>Ability to perform under time-pressures and meet deadlines</p> |
| KNOWLEDGE & CHARACTERISTICS | <p>Professional appearance and demeanor, highly-motivated</p> <p>Client-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 assignment within time constraints and deadlines.</p> <p>High growth potential with opportunities for upward advancement</p> |
| WORKING CONDITIONS | <p>Ability to sit and/or use a computer for extended periods of time.</p> <p>Ability to travel by air and car, if required.</p> <p>Ability to carry and transport bags, computers, etc.</p> <p>If needed, ability to provide own transportation for traveling to client assignments and for personal development/continuing education</p> <p>Infrequent out-of-town travel with overnight stay for work at client site, meetings or seminars;</p> <p>Overtime work required throughout the year, especially during tax busy season periods.</p> <p>Total hours generally range from 2,080-2,300, including PTO.</p> |

PROPRIETARY AND CONFIDENTIAL TO PUGH CPAs