



CLECONSULTINGFIRM

TAX ACCOUNTANT

JOB SUMMARY

High-level professional capable of overseeing the tax policies and objectives. Monitors reporting and planning to ensure compliance with applicable tax statutes. Manage and facilitate the accurate preparation and filing of client's state, local and federal tax forms. The ideal candidate is a team player who manages the tax team to greater performance, creates and implements tax plans and works with the accounting and leadership teams to identify opportunities for process improvement and potential areas of risk. Monitor current and impending changes to tax regulation and make the appropriate updates to policies and strategies deployed by the tax team. Possess a strong background in tax law, regulations, and accounting principles, along with excellent communication skills to provide exceptional client service.

DUTIES AND RESPONSIBILITIES

Tax Planning and Preparation:

- Conduct in-depth reviews of financial records to identify potential deductions, credits, and liabilities.
- Prepare and file accurate and timely tax returns for small businesses, non-profit organizations, and individuals.
- Develop and implement tax planning strategies to optimize clients' financial positions.

Client Communication:

- Maintain regular communication with clients to gather necessary information and provide updates on tax-related matters.
- Offer proactive advice on tax implications, financial strategies, and compliance issues.
- Address client inquiries and concerns in a timely and professional manner.

Research and Analysis:

- Stay abreast of changes in tax laws and regulations to ensure compliance and optimize client outcomes.
- Conduct thorough research on complex tax issues and provide well-founded recommendations.

Collaboration:

- Work closely with internal teams to ensure accurate and timely financial reporting.
- Collaborate with colleagues to share knowledge and best practices.

Client Relationship Management:

- Cultivate strong, trusting relationships with clients by delivering exceptional service and demonstrating expertise in tax matters.
- Identify opportunities to expand services and grow client relationships.

MINIMUM REQUIREMENTS

- Bachelor's degree in Accounting, Finance, or related field.

- Proven experience as a Tax Accountant, with a focus on small businesses, non-profits, and individuals.
- In-depth knowledge of tax laws, regulations, and compliance.
- Strong analytical and problem-solving skills.
- Excellent communication and interpersonal skills.
- Proficiency in tax preparation software, Drake, and Microsoft Office Suite.

OTHER JOB REQUIREMENTS

- Expert knowledge and understanding of accounting processes and required documentation.
- Ability to manage multiple projects at a time with great time management and organizational skills.
- Excel, Word, Drake, QuickBooks and/or similar accounting/tax software knowledge
- Detail-oriented with an ability to be a Self-starter, able to create efficiencies or solutions for existing or unexpected scenarios.
- Communicate effectively and professionally in writing, emailing, texting, and speaking on the phone.
- Additional duties as required by the job and as assigned by partner or client.
- Time management – Able to set priorities in order to meet assignment deadlines.

DESIRED REQUIREMENTS

- Enrolled Agent
- JD and/or CPA preferred