TAX MANAGER – FULL-TIME
JOB DESCRIPTION

Summary

The Manager is the liaison between the shareholder, the client, and the professional staff. Managers are responsible for managing multiple tax projects and client engagements simultaneously, and scheduling, staffing and coordinating engagement workflow. Managers develop relationships with clients/business owners.

Technical Responsibilities

1. Prepare complex returns.
2. Begin to review returns.
3. Be responsible for tax engagements.
4. Prepare complex client and other correspondence including recommendations, technical issues, articles, proposals, etc.
5. Identify and communicate new tax law developments.
6. Understand tax developments and implications on client's business.
7. Organize work schedule in order to comply with client and statutory deadlines.
8. Comply with due dates and monitor time budgets of returns.
9. Communicate directly with clients.
10. Participate in tax season planning.
11. Complete Assignment Performance Reviews for Staff and Seniors.
12. Demonstrate appropriate delegation of work to staff.
13. Initiate and prepare billing for Shareholder approval.
14. Focus on efficiency, but not relinquishing quality.
15. Over-communicate up/down/across.
16. Assist with department responsibilities (quality control, efficiency, Caseware updates, department CPE, Tax law updates)
17. Conduct in-house continuing education seminars based on firm development needs.
18. Conduct research and provide thorough conclusions and supporting documentation.

Administrative Responsibilities

1. Begin to perform regular billing responsibilities, seeking shareholder approval before finalizing.
2. Communicate expectations to ensure projects are completed on time and within budget.
3. Act as a liaison between shareholders, clients and professional staff to ensure client's needs/expectations are met.
4. Be involved in the recruitment of new and experienced staff through connecting with referrals, attending recruiting activities and conducting in-house interviews.
5. Assist in preparing proposals and attending proposal presentation to potential clients.
6. Complete Assignment Performance Reviews for Staff/Seniors.
7. Attend and participate in the bi-annual department performance discussions.
8. Attend weekly department scheduling meeting.
9. Attend weekly inter-department scheduling meeting.
10. Participate in New Hire Orientation programs.
11. Participate in various departmental administrative functions.

Education/Experience Required

Five to ten years of public accounting experience
Bachelor's degree in Accounting
CPA required

Client Service

Has frequent client contact, is respected by clients and is viewed by the client as a reliable contact point.
Consistently coordinates the accurate, timely and efficient completion of projects that follow firm and professional standards and meet client's need.
Makes every reasonable effort to ensure client's needs and timetable are clearly understood and met

Supervision

Performs the scheduling, staffing, supervising and coordination of engagement workflow on assigned projects.

Professional

Stay current with Continuing Professional Education requirements.
2,350 total hours per year
1,500 chargeable hours
Represent SDK well by appropriate grooming, attire and behavior.

Interpersonal Competencies

Initiative

- Believes in own ability to get things done and be successful.
- Identifies and implements ideas for continuous improvement for clients and the firm.
- Anticipates client and owner needs.
- Initiates individual or group projects and takes complete responsibility for the project.

Communication

- Effectively explains information through internal presentations.
- Creatively identifies and utilizes effective communication methods and channels.
- Openly discusses real or potential problems with clients or project team members, hearing and understanding what a person tries to say as well as what they said.
- Effectively articulates both the big picture and the details.
- Uses relevant examples, analogies, and personal experiences to clarify ideas

Conceptual Thinking

- Identifies meaningful trends or patterns in interactions, situations, and technical data that suggest possible problems or potential solutions.
- Uses experience and knowledge from other situations with similar dynamics to create effective approaches and solutions.

Results Orientation

- Focuses the effort and energy of the client service team on the most critical activities/issues of a project.
- Coordinate activities, shares information, and effectively/efficiently manages resources throughout a project.
- Sets challenging personal and client service team goals and takes action to achieve them.

Strategic Thinking

- Demonstrates understanding basic principles of strategic planning.
- Demonstrates knowledge of global and strategic business issues affecting the firm and the profession.
- Understands clients' key stakeholders' expectations for their business.
- Participates as necessary in the implementation of the firm's goals as it relates to the accounting services department.

Change Orientation

- Effectively manages clients' expectations concerning project deliverables and deadlines.
- Develops contingency plans to ensure projects are completed on time and within budget.
- Develops clear, understandable goals/priorities and persuasively communicates them to others.
- Responds immediately to changing situations by coming up with innovative, creative ideas and actions, and reconsiders even the most strongly held ideas.
- Persuasively communicates the need to change and helps others understand why change is important.

Leadership Competencies

Teamwork

- Effectively addresses conflicts as they arise within project teams.
- Takes a leadership role in team building and monitoring progress.
- Identifies roles of team members and understands group dynamics.
- Helps remove internal barriers and identifies resources to assist the team.
- Encourages team members to express ideas, and considers them with an open mind.

Developing Self and Others

- Acts as a mentor.
- Actively participates in and, as appropriate, facilitates continuing education.
- Possesses a broad learning capacity, is open to new ideas and learning new things.
- Generously shares knowledge with others to facilitate skill development and career advancement.
- Effectively and candidly communicates performance messages through the use of positive reinforcement.

Relationship Building

- Builds a strong network of professional relationships within the general business community, civic organizations, professional groups, and industry/niche groups.
- Uses networks of personal relationships to gather information and test ideas.
- Develops long-term relationships within client organizations based on mutual trust and respect.

Influence

- Persuades others by appealing to reason or logic with facts and data.
- Actively seeks, discusses, and listens to information and ideas from others.
- Identifies key decision makers and the people who influence them.
- Anticipates reactions and objections, and plans how to overcome them.
- Adapts to each situation and handles them from the appropriate perspective.

Marketing/Business Development

Develops strong, positive relationships with key personnel within the client organization
Involvement in industry, civic and social activities
Communicates industry happenings to others
External marketing activities – involvement in consistent activity with appropriate leadership function
Initiate and follow-up on business development niche activity

Personal

Strike a balance with work and non-business life, effectively setting limits.
Maximizes opportunities for personal and professional growth.

Working Conditions

Occasional same-day travel for work at client's offices, meetings, and seminars using personal vehicle.
Occasional out-of-town travel with overnight stay for work at clients, meetings, or seminars using personal vehicle or other means of transportation.
Work may be required in excess of 55 hours per week, to achieve client deadlines.

To Apply

Send a cover letter and resume to HR Manager Tiffany Hand, thand@sdkcpa.com