

# We're Hiring a Tax Manager!

## **Job Overview:**

We are NOT your typical Accounting Firm... this is a fun team dedicated to balancing the needs of our clients and our employees for sustainable and successful business!

Do you want to be part of a client-oriented accounting team? Are you ready for the challenges of working within a fast-evolving vertical within a close-knit, high-functioning department?

Indiva Advisors is committed to delivering quality in assurance, tax and advisory services. We are seeking an experienced, curious, analytical Tax Manager who will play an important role in our expanding 280e specific Tax Practice. The Position can be done remotely and includes a generous Employee Value Proposition (comprehensive benefits package, support for flexible work, generous PTO, Paid Holidays, and support for work/life balance as you define it.) We are inclusive and team-oriented while remaining focused on goals.

## **Position Description**

### **POSITION DESCRIPTION**

As the Tax Manager, you will be responsible for ensuring a company's compliance with all applicable federal, state, and local tax regulations. A primary job duty will be preparing taxes, such as quarterly and yearly returns and payables or estimates and overseeing the work of junior tax personnel.

As the Tax Manager, you will be overseeing all audits, establishing and employing methods to streamline tax preparation, and staying abreast of recent tax laws and educating management on their impact on the company. You will be tasked with staffing the tax department, which involves screening, hiring, and training employees. Responsibility for liaising with an outside accounting firm during the tax preparation process. As a tax manager, you must be able to identify work practices or processes that may put the company at risk for tax liabilities.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

#### **Plan and manage client tax and advisory engagements**

- Provide excellent client service, including timely communication and prompt response to client inquiries
- Manage client expectations and ensure commitments are met in a timely fashion
- Work directly with clients to collect information needed to complete deliverables
- Provide client advisory services with respect to client tax operations, tax structure, systems, etc.
- Identify client needs to strengthen relationships and to expand service offerings
- Prepare engagement budgets and client proposals

#### **Manage tax workflow**

- Create Statements of Work, establish budgets, set Projects up in work-flow software
- Plan and schedule tax/advisory work to support internal and external deadlines
- Set priorities for engagement team to meet client expectations

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- Design and implement tax processes to ensure efficient and accurate completion of client work
- Manage and adjust staff schedules as required to support business needs
- Assume the role of preparer as needed to meet deadlines

#### **Close out every engagement**

- Close WIP and submit client billing to firm accountant
- Assess realization
- Analyze budget variances and take steps to improve performance: implement changes to improve efficiency, identify scope growth, etc.

#### **Support and train junior staff**

- Provide day to day supervision and guidance
- Ensure staff performance and productivity expectations are clearly communicated
- Train staff on use of tools and procedures
- Identify and address training needs of junior staff
- Review work of junior staff to ensure deliverables meet work product quality standards

#### **Participate in firm management activities**

- Identify resource requirements and participate in the recruitment and hiring processes for new staff
- Develop internal procedures and create written documentation to ensure consistent application
- Assess budget performance, analyze variances and develop corrective action plans
- Evaluate staff performance, make recommendations for development, advancement, and training
- Model expected behaviors with respect to adaptability, use of technology, work ethic, commitment and professionalism.
- Assume leadership role in the development of internal processes, implementation of new software, host lunch and learn trainings, find opportunities for continuous improvement

### **REQUIRED EDUCATION AND EXPERIENCE**

- Minimum of 6 years of experience required
- BS degree in Tax or Finance
- CPA and Graduate Degree preferable
- Proven working experience as Tax Manager, Tax Supervisor or Finance Manager
- Multi-state and complex return experience preferred.

### **JOB KNOWLEDGE, SKILLS AND ABILITIES**

- Excellent financial aptitude, with the ability to perform complex calculations when preparing taxes.
- Advanced computer skills on MS Office, tax software and databases, CCH Access preferred.
- Ability to manipulate large amounts of data
- Proven knowledge of bookkeeping and tax principles, practices, standards, laws and regulations
- Accuracy, Timeliness, Attention to Detail, Organization, Multitask, Verbal and Written Communication, Team Player, Interpersonal Skills, Leadership, Collaboration, Analysis

- Must demonstrate sound decision-making skills
- Self-motivated/directed
- Must be able to interact with varied individuals of all professional levels
- Ability to supervise, train and motivate staff
- Mature, organized and responsible
- Excellent communication skills
- Must be able to meet strict deadlines and work under pressure

#### **PHYSICAL DEMANDS**

- This is a sedentary position. Requires the ability to sit for long periods of time in an office setting using keyboard, computer and phone equipment.