

## **JOB DESCRIPTION**

**Position Title:** Manager, Tax & Accounting  
**Reports to:** Principal / Director  
**Department:** Tax  
**FLSA:** Exempt  
**Prepared by / Date:** Z. Ciffoni, 07/24/2019  
**Approved by / Date:**

### **Position Summary:**

The Tax Manager position is responsible for larger and more complex engagements and may oversee two or more engagements simultaneously. The Manager is responsible for managing engagements and special assignments, reviewing complex tax returns, work papers and financial statements and communicating with clients on a one-to-one basis. The Tax Manager provides tax compliance, planning and consulting; participates in administrative planning, in continuing education and personnel development, supports the Firm's mission, vision and values by exhibiting behaviors of excellence and competence, collaboration, innovation, commitment, and accountability.

### **Essential Duties and Responsibilities:**

- Oversees client relationship and the various phases of engagements, monitors performance against budget, reviews moderate work papers for accuracy and completeness, and reviews financial statements for suitability of presentation.
- Reviews complex tax returns, individual, corporate, partnership, estate, trust, gift, welfare benefit plan and state income tax returns, and resolves accounting and tax problems as they arise.
- Oversees and reviews consulting engagements.
- Develops and maintains long-term professional relationships with clients through exceptional client service by communicating engagement's progress, problems, resolutions and other business concerns to the client.
- Identifies opportunities to expand services to existing clients and with management participation in selling these services.
- Assigns and delegates work to staff members based on knowledge and capabilities
- Supports training and development of staff members, offers guidance, direction and feedback of work papers and tax return preparation.
- Stays abreast, analyzes and interprets business periodicals, professional journals, technical procedures or government regulations.
- Researches technical tax issues, reviews IRS/State correspondence and determinations  
Performs other duties as assigned

### **Knowledge, Skills and Abilities:**

- Ability to negotiate and persuade clients with integrity, and communicate effectively in the sales process ensuring clients have the information they need to make decisions.

- Strong understanding of the firm's structure, the people, the services provided as well as the firm's clients, and understanding of client expectations and translating expectations into practical, implementable assignment/project objectives.
- Ability to manage engagements and special assignments using established Firm policies and procedures.
- Vast knowledge and application of the relevant professional standards, emerging laws and regulations, corporate governance requirements and application of technical expertise, regulations and standards to formulate client related recommendations.
- Ability to work with clients to help identify and structure problems and develop and implement effective solutions.
- Excellent consulting, client service, presentation and communication skills, verbal and written, and uses this knowledge to help diagnose needs/opportunities and suggest solutions, projecting confidence and credibility in dealing with clients.
- Able to build long term relationships with clients; gains trust and respect based on demonstrated understanding of their business and is able to help achieve improvement goals.
- Vast knowledge of technical tax requirements, laws and accounting principles
- Exceptional planning and organizational skills and ability to establish workload priorities and to manage multiple assignments in a fast-paced environment
- Able to work additional hours as needed and travel to various client sites as may be required

#### **Minimum Requirements:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily.

- Bachelor or Master Degree in accounting or related field is required.
- Six to seven (6 – 7)+ years of progressive public accounting experience in tax
- Licensed CPA

#### **Work Environment:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. While performing the duties of this job, the noise level in the work environment is usually quiet.

#### **Physical Demands:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to sit and reach with hands and arms. The employee is regularly required to use hands to finger, handle, or feel objects, tools, or controls and talk or hear.

Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

#### **ACKNOWLEDGEMENT:**

I have read and acknowledge receipt of a copy of my job description.

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**Signature**

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**Date**

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**Printed Name**