

JOB DESCRIPTION

Position Title: Supervisor, Tax & Accounting (T&A)
Reports to: Principal / Director / Sr. Manager / Manager
Department: Tax
FLSA: Exempt
Prepared by / Date: Z. Ciffoni, 07/19/2019
Approved by / Date:

Position Summary:

The primary responsibilities of the Supervisor, Tax & Accounting position are to deliver a full range of tax services for multiple clients in a wide variety of industries, by interacting with clients and preparing complex tax returns, and reviewing moderate tax returns for timely filing. The Supervisor develops and manages staff, works closely with senior management on client management, practice development, and business development activities. The Supervisor role is responsible for client assignments and projects, and delivering a high quality service. This includes coaching, advising and supporting team members in meeting client and self-development expectations.

Essential Duties and Responsibilities:

- Oversees and coordinates various phases of engagements: plan engagements, budget time and expenses, monitors actual performance against budget, reviews workpapers for accuracy and completeness, and reviews financial statements for suitability of presentation
- Prepares complex tax returns for individuals, partnerships and corporations and reviews moderate tax filings for timely submission
- Assist senior management with the preparation of consulting engagements
- Demonstrates extensive technical skills with tax compliance assignments for partnerships, S-corporations, trusts, and individual tax clients working proficiently with specific tax forms.
- Ensures compliance with appropriate state, federal and international tax jurisdictions
- Develops and oversees client relationship maintaining excellent working relationships with clients to enhance customer satisfaction.
- Maintains ongoing communication with senior management, ensures client satisfaction, makes sure deadlines are met and leads change efforts effectively.
- Supervises, guides and mentors staff, from interns to Senior T&A on tax preparation process and provides feedback of workpapers
- Attends professional development and training sessions on a regular basis and stays informed regarding tax changes and issues that could affect clients.
- Performs other duties as assigned

Knowledge, Skills and Abilities:

- Ability to supervise engagements and special assignments using established Firm policies and procedures

- Demonstrates exceptional client service skills, and excellent communication skills, verbal and written.
- Strong judgment, problem-solving, and decision-making abilities
- 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's or Master degree in Accounting and,
- Four to five (4-5)+ 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.

Signature

Date

Printed Name