



JOB DESCRIPTION

Position Title: Senior, Tax & Accounting (T&A)
Reports to: Principal / Director / Sr. Manager / Manager / Supervisor
Department: Tax
FLSA: Exempt
Prepared by / Date: Z. Ciffoni, 07/17/2019
Approved by / Date:

Position Summary:

The position of Senior, Tax & Accounting is responsible for the delivery of a full range of tax services for multiple clients in a wide variety of industries. The person in this role interacts with clients providing primary and secondary review of simple tax returns. The Senior T&A organizes, develops and manages client assignments and projects. The person in this role coaches, advises and directs team members in completing client and self-development expectations. The position assists senior management on client communication and business development activities.

Essential Duties and Responsibilities:

- Prepares moderate tax return forms for individuals, partnerships and corporations, and ensures tax adjustments are made to financial statements for preparation of tax returns and reviews tax filings for timely submission
- Performs primary and secondary review of simple tax returns
- Assists management with client communication and consulting activities
- Demonstrates technical skills with tax compliance assignments for partnerships, S-corporations, trusts, and individual tax clients working proficiently with specific tax forms
- Understands performance expectations and manages own and others work to meet these expectations
- Achieves agreed utilization rate by communicating regularly with Managers on availability and assignment progress
- Organizes project activities and ensures tasks are completed within project scope and budget
- Performs review of the team's work to ensure quality and thoroughness and completion of assignment tasks within agreed timeframes
- Supervises, trains, and mentors Staff and interns
- Develops excellent working relationships with clients to enhance customer satisfaction, and works with client management and staff at all levels to perform tax services
- Keeps abreast of, and researches market trends and business developments and alerts clients as appropriate
- 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:

- Knowledge of technical tax requirements, laws and accounting principles
- Demonstrates effective communication, verbal and written skills, active listening and questioning skills to understand the client's business and their needs
- Strong judgment, problem-solving, decision-making abilities, exceptional client service skills
- Effective planning and organizational skills and ability to establish workload priorities
- Ability to understand and apply working knowledge of the firm's services
- Ability to work additional hours as needed and travel to various client sites
- Solid knowledge of Microsoft Office to produce workpapers, working trial balances, and related spreadsheets to support tax return preparation
- Ability to understand and comply with the Firm's service approach, professional requirements, policies and procedures
- Ability to understand and support the Firm's mission, vision, values and business strategies by exhibiting behaviors of excellence and competence, teamwork, innovation, respect, commitment and accountability

Minimum Requirements:

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

- Bachelor's degree in Accounting and,
- Three to four+ years (3-4) of progressive public accounting experience in tax or,
- Licensed CPA or Enrolled Agent

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

