WOUCH MALONEY
CPAs & BUSINESS ADVISORS

Job Title:	Tax Manager
Department:	Compliance
Reports To:	Director/Partner
Classification:	Full-time

General Summary

The Tax Manager recognizes important issues and provides manageable solutions; makes sound, well informed, and objective decisions with data and information from a variety of sources; takes action that is consistent with research, probable consequences and firm policy.

Essential Job Functions:

- Prepares personal and entity tax returns including the most complex
- Reviews tax returns/work files for completeness, accuracy and compliance; communicates with and trains staff on areas needing improvement
- Assumes the responsibility for the smooth flow of tax returns
- Manages workloads and work products of other tax staff members; delegates tax work to staff
- Monitors tax deadlines to ensure that returns are prepared on a timely basis; communicates with managers during the preparation process to identify any tax issues needing addressing and to pull jobs so that they reach the technical review stage timely
- Supervises extension process to ensure accurate and timely preparation
- Supervises tax planning of entities and more complex personal tax returns
- Monitors and analyzes all incoming tax notices and drafts responses
- Trains staff to prepare effective responses to tax notices and reviews for accuracy
- Manages tax examinations
- Assists staff in client meetings as appropriate
- Performs tax research and helps train staff to do the same; schedules annual tax research training session for all staff through WM current vendor
- Develops a general understanding of firm philosophy and tax opinions
- Reviews tax accruals and associated workpapers
- Informs clients (or staff member) of tax options available and possible outcomes through clear and concise memos, emails or letters
- Seeks and communicates efficiencies in producing quality work products
- Initiates new work for existing clients
- Stays current on new legislation and educates staff and clients
- Acts as a resource for staff, senior accountants, managers and partners
- Prepares periodic email blasts to clients and others re new developments
- Reads all incoming tax literature and disperses to/trains staff as appropriate
- Oversees tax, tax planning and fixed asset software to ensure defaults are properly set for WM practice; disseminates software enhancements to staff
- Bills select clients and discusses fees with certain clients
- Acts as key client contact person for select engagements
- Contributes to the client service team by producing quality work with quick turnaround and attentive service
- Establishes good working relationships with all staff
- Attends continuing professional education on tax and other related topics
- Interacts with other tax professionals (attorneys, peers)

Desired Skills, Abilities and Characteristics

- Demonstrates the firm’s core values daily
- Exhibit expert understanding of tax rules
- Excellent verbal and written communication skills
- Demonstrate a level of intellectual curiosity
- Consistently demonstrate strong personal, technical and professional judgment
- Perform work accurately and in a time-efficient manner with strong attention to detail

- Strong organizational and follow-through skills
- Ability to effectively prioritize a fast-paced and varied workload, effectively manage a variety of concurrent and shifting priorities
- Ability to accept constructive feedback from Partner group and make adjustments as directed
- Ability to work collaboratively and foster a productive, team-oriented environment
- Strong computer skills, including solid skill in the Microsoft Office suite (particularly Excel) and report writing tools
- Maintain a professional demeanor with coworkers and clients
- Able to gain the confidence of the existing Partner group
- Ability to meet internal Firm deadlines (time entry, billing, etc.)
- Available to work evenings and weekends based on position needs

Education and/or Experience

- Bachelor's degree in accounting, or master's degree in accounting
- 5-8 years of experience in public accounting
- CPA license required

Benefits

- Competitive benefits package
- 401(k) and Roth 401(k) with company match
- Short and Long-term Disability fully paid by Company
- PTO and 2 Floating Holidays
- In-house training
- Firm pays 100% of course required to maintain CPA license
- Flexible Schedules
- Competitive salaries with continuous review of market conditions
- Strong growth opportunities
- Discretionary bonuses two times during the year
- Strong emphasis on quality work-life integration
- Expanding Social Impact department for a healthy, happy, inclusive, and productive workplace as well as other committees to get involved in