

Title: Manager
Department: Tax
Reports to: Department Head Partner
FLSA Status: Full time, Exempt
Date Revised: May 2011

Summary:

The Manager is responsible for the efficient, accurate, complete, and timely preparation of all clients' tax returns. Advanced technical skills in a variety of tax and accounting areas, along with well developed and applied management and supervisory skills are required. The Manager makes decisions on all but the most unusual tax situations.

Essential Functions:

1. Performs technical tax review and approval of all tax returns and governmental tax examinations of any complexity.
2. Assumes full responsibility for larger tax returns and delegates to the various tax preparers as deemed necessary.
3. Demonstrates thorough knowledge and proficiency in advanced technical skills necessary for advising clients.
4. Performs all task related to client service and sees that assignments are accomplished within budgeted time.
5. Delegates and manages tax research projects to achieve an accurate and efficient product.
6. Participates actively in client meetings and tax planning efforts to assist the Auditing and Accounting Department with larger clients.
7. Acts as a resource for tax preparers/specialists and A&A staff on specific tax issues and/or questions.
8. Assumes tax preparation responsibility for the more complex business returns.
9. Assumes client service responsibility for clients the Tax Manager works directly with or clients where the responsibility is delegated from the Partner.
10. Communicates to the appropriate firm personnel important tax and tax developments affecting the firms' clients.
11. Delegates and manages governmental tax examinations; may represent the client before the appropriate taxing authorities.
12. Maintains familiarity with qualifications of all tax staff members; reviews staff assignments for appropriateness.
13. Supervises tax staff and provides on-the-job training.
14. Works to develop responsible, trained staff by assisting in recruiting, performance evaluations, development training aids, and acting as an instructor in professional development programs.
15. Assumes responsibility for smooth flow of tax returns through the tax preparation system to assure accurate, complete and timely preparation and delivery of all clients' tax returns.
16. Adheres to accurate and timely billing and collection processes are made.
17. Possesses a complete knowledge of the firms' philosophy and its opinions on tax matters.
18. Maintains knowledge of general economic and political trends of possible tax or other legislation that could affect the business climate.

Nonessential Functions:

1. Prepares other reports and projects as requested from time to time by the partners.
2. Researches and evaluates tax preparation and tax research software for recommendation to partners.
3. Participates in firm practice development efforts through involvement with referral sources, community and industry activities.
4. Promotes the most efficient operations of the Firm and supports compliance guidelines in managing others.
5. Performs such other duties as may be assigned.

Knowledge, Skills and Abilities:

1. Demonstrated knowledge of current tax laws.
2. Proficiency in use of computer tax preparation, tax research, and tax planning software programs.
3. Ability to operate a computer and calculator.
4. Ability to organize work and projects, prioritize and meet deadlines. Ability to complete work in an efficient and accurate manner.
5. Ability to reason and effectively multi-task.

Supervisory Responsibilities:

1. Responsible for the development, coaching and training of Supervising Seniors, Seniors, Semi-seniors and Staff accountants.
2. Must be familiar with the qualifications of all Tax staff members for the development and instruction of their training needs.
3. Participates in reviews and evaluations of the Tax Department.

Working Conditions:

1. Occasional same day travel for work at clients' offices, meetings, and seminars using a personal vehicle.
2. Occasional out-of-town travel with overnight stay for work at clients, meetings, or seminars using a personal vehicle.
3. Occasional overtime work required throughout the year. Heavy overtime work required from January 1 to April 15, may be in excess of 55 hours per week.
4. Minimal Hazards. General office working conditions.

Minimum Qualifications:

1. At least five to seven years experience in public accounting, demonstrating a proven progression in tax complexity, scope, and research.
2. At least two (2) years experience representing clients before taxing authorities.
3. Minimum one (1) year experience supervising and directing work of tax preparers.
4. Bachelor's degree in accounting required, Master's degree in taxation preferred.
5. Minimum of forty hours of continuing education is required each year to maintain and develop technical and business skills.
6. A current and valid certified public accountant's license is required.
7. Must be a member in good standing with the American Institute of CPAs.

Success Factors:

1. Participates in career development program to improve managerial, communication, and interpersonal skills.
2. Outstanding oral and written communication skills,
3. Excellent interpersonal skills

This job description does not list all the duties of the job. You may be asked by Partners or peers to perform, or assist in performing, other instructions and duties. You will be evaluated in part based upon your performance of the tasks listed in this job description.

Management has the right to revise this job description at any time. The job description is not a contract for employment, and either you or the employer may terminate employment at any time, for any reason.

Date: January 9, 2012

Employee's Signature: _____

Employee's Printed Name: _____