CPAs & ADVISORS

**Job Title:** Estate, Gift and Trust Tax Manager
**Department:** Tax
**Reports to:** Estate, Gift and Trust Director
**Level:** Exempt
**Location:** Louisville
**Last updated:** April 27, 2021

**Summary of Responsibilities:**

The Estate, Gift and Trust Tax Manager will work closely with the Firm's high net worth clients. He/She will oversee the tax compliance related to such work. The Manager will also work with those dedicated to client projects and assist with specialized research as it relates to the estate and trust planning specialty. This role includes staff mentoring, management and administrative functions. The individual responsible for this area of practice will work closely with the Estate, Gift and Trust Director and the Tax Team Leader and will assist in driving strategic initiatives agreed upon by the service team. The Firm is expanding services in this area, the person in this role will work with our wealth management team as well. Advanced technical skills in a variety of tax areas, along with well-developed and applied communication, management and supervisory skills are required.

**Essential Functions:**

- Management and review of estate, gift and trust tax compliance work
- Assist in developing Estate Planning and Wealth Management strategies for pre and post retirement clients.
- Advise clients on Estate Planning opportunities. Manage current and potential issues related to tax strategy.
- Participate as an active member of Firm's industry groups to help promote product lines across Firm disciplines (Manufacturing, Construction/Real Estate, Hospitality, Controversy, etc).
- Act as a resource for tax preparers/specialists and auditing staff on specific tax issues and related questions.
- Assume client service responsibility where the responsibility is delegated from another team member.
- Communicate to the appropriate firm personnel important tax developments affecting the firm's clients.
- Research and analyze trends that may impact estate planning clients.
- Supervise, develop, and coach team members as assigned.
- Works to develop responsible, trained staff by assisting in recruiting, performance evaluations, develop training aids and act as a coach in professional development programs.
- Develop individuals to grow number of practitioners in this specialty area as needed
- Possess complete knowledge of the firm's philosophy and its opinions on tax matters.
- Maintain knowledge of general economic and political trends and stay abreast of possible tax or other legislation that could affect the business climate
- Sustain a strong familiarity with specific issues that arise with wealthy clients and consistently display distinct ability to respond to estate planning or wealth management issues and offer advice to clients on how to proceed upon notice of life change.

- Work with legal counsel to memorialize client's intent through document production.
- Work with attorneys as needed to carry out the client's final wishes within the scope of the law, distributing property, paying debts and beginning the estate administration process.
- Responsible for billing projects and managing tax related accounts receivable for the firm.
- Set individual goals that support departmental and firm goals.
- Meet budget constraints and deadlines.
- Support MCM's participation in selected professional activities/boards, such as GLI, KY Chamber, Prime Global, etc.
- Perform other duties as assigned.

**Education, Experience, and Skills:**

- Bachelor's degree from an accredited college or university.
- Must have at least 5 years of experience in a professional services firm, with a concentration in estate planning services and related compliance work.
- Complete assigned CPE or professional development courses as required annually.
- Current and valid license required (JD or CPA).

**Expectations:**

- Respect and earn the respect of fellow team members
- Take ownership of identified processes and responsibilities
- Keep open communications with manager, team and leadership
- Perform work with confidence and pride, follow through to completion
- Dependable
- Make informed decisions – discuss with manager when needed
- Work personal/professional development plan
- Must have flexibility with work schedule
- Be willing to market firm service lines to potential clients

We are committed to providing equal employment opportunities to all employees and applicants without regard to race, ethnicity, religion, color, sex (including childbirth, nursing and related medical conditions), gender, gender identity or expression, sexual orientation, national origin, ancestry, citizenship status, uniform service member and veteran status, marital status, pregnancy, age, protected medical condition, genetic. information, disability, or any other protected status in accordance with all applicable federal, state and local laws.

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