



Job Title: Tax Supervisor
Department: Tax
Reports to: Tax Manager/Tax Senior Manager
Status: Full-time
Level: Exempt
Last Updated: 7.19.21

Summary of Responsibilities:

A Tax Supervisor is the liaison between partner, managers, clients and internal staff in fulfilling the Firm's mission. The Tax Supervisor's role covers the same area of responsibilities and functions as a Tax Senior, but includes a broader area, including more complex assignments and a more extensive tax knowledge. The Tax Supervisor has more involvement in business development, staff management and development, and administrative functions.

Essential Functions:

- Performs diversified tax related projects under the direction of manager, senior manager or partner.
- Acts as a resource for tax staff and auditing staff on specific tax issues and/or questions.
- Detail review of individual and business tax returns, and supervise related tax engagements.
- Suggests client tax planning ideas to manager, senior manager or partner.
- Brings complex or significant tax questions to the attention of the managers.
- Meets budget constraints and deadlines.
- Supervises/develops/coaches team members as assigned.
- Sets individual goals that support departmental and firm goals.
- Begins reviewing basic tax returns.
- Responsible for billing tax work
- Assumes client service responsibility for clients the tax manager works directly with or clients where the responsibility is delegated from the partner
- 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
- Performs other duties as assigned.

Education, Experience, and Skills:

- Bachelor's degree in accounting from an accredited college or university
- Must have at least 4 years tax compliance and/or consulting experience, preferably with a public accounting firm.
- Complete assigned CPE or professional development courses as required annually.
- Current and valid CPA license required.



- Must be able to prepare and review basic tax returns without errors.

Expectations:

- Respect and earn the respect of fellow team members.
- Take ownership of identified processes and responsibilities.
- Keep open communications with manager and partners.
- Perform work with confidence and pride, follow through to completion.
- Dependable.
- Make informed decisions – discuss with manager when needed.
- Grow and learn from past mistakes.
- Work in a safe, clean and employee friendly atmosphere.
- Work personal/professional development plan.
- Must have flexibility with work schedule.

Working Conditions:

- Local and overnight travel may be required.
- Heavy overtime required during busy periods.

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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