



Job Title: Senior Tax Associate
Department: Tax
Reports to: Tax Supervisor/Tax Manager
Status: Full-time or Part-time
Level: Exempt
Last updated: 2021

Summary of Responsibilities:

A Senior Tax Associate is responsible for organizing and analyzing client records to facilitate the timely and accurate preparation of required tax returns and forms. Senior Tax Associates also work with minimal assistance and often lead Tax Associates, instructing them on work to be performed, use of software, reviewing the work done, and directing necessary revisions.

Essential Functions:

- Perform diversified tax related projects under the direction of supervisor, manager, senior manager or partner.
- Prepares complicated tax returns, including returns on dissolution or liquidation.
- Prepares and indexes workpapers.
- Suggests client tax planning ideas to supervisor, manager or partner.
- Prepares routine correspondence for approval and signature of a partner.
- Meets budget constraints and deadlines.
- Supervises/develops/coaches team members as assigned.
- Sets individual goals that support departmental and firm goals.
- Performs other duties as assigned.
- Has working knowledge of tax law - can begin identifying issues.

Education, Experience, and Skills:

- Bachelor's degree in accounting from an accredited college or university
- Must have at least 2 years tax compliance and/or consulting experience, preferably with a public accounting firm
- Complete assigned CPE or professional development courses as required annually
- CPA license preferred

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 may be 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, breast feeding 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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