



POSITION DESCRIPTION

Position Title: TAX MANAGER

Classification: Full-Time, Exempt

Reports To: Partner and/or Manager

Supervises: Staff Accountants

SUMMARY OF RESPONSIBILITIES

The Tax Manager is the liaison between the Partner, the client, and the Staff. Tax Managers are responsible for managing multiple small business accounting projects and client engagements simultaneously, providing quality client service, maintaining profitable client relationships, and scheduling, staffing, and coordinating engagement workflow. Tax Managers develop and train staff, and make associations to develop new business for the Firm.

ESSENTIAL FUNCTIONS

- Responsible for all phases of small business accounting engagements including compilation, preparation of financial statements, and/or review. Manages and completes multiple engagements of all levels of complexity with an emphasis on quality standards, timely completion, and profitability. Ensures that financial statements, tax returns, and letters of recommendation are prepared in accordance with professional and Firm standards. Keeps the partners informed of all important developments on engagement, analyzes problems, and recommends solutions.
- Plans, schedules, and staffs engagements following the Firms' policies and procedures. Utilizes and enforces standard Firm and department procedures and policies. Recommends and implements improvements as appropriate.
- Resolves client issues and problems. Anticipates problem areas of an engagement and questions that will arise. Assists other departments in client small business matters. Acts as a liaison for other accounting and consulting services provided by the Firm and strategic alliances of the Firm.
- Compiles research and prepares reports and memoranda on various small business topics.
- Assists in the preparation of proposals and engagement letters.
- Supervises, trains, and develops staff assigned to engagements managed including the preparation of work papers and financial statements. Conducts engagement completion and mid-year performance evaluations for staff and provides data for the preparation of the annual performance evaluation.

- Prepares invoices for partner review and approval. Communicates details of fees to clients. Assists in the collection of past due client balances. Reviews and monitors engagement WIP to ensure adherence to engagement time and billing budget.
- Maintains a knowledge of general economic and political trends of possible tax or other legislation that could affect the business climate. Maintains a current knowledge of industry trends of assigned industry niche to improve market share. Gains knowledge of new and emerging accounting practices, procedures, and legislation that could benefit existing client base.

OTHER FUNCTIONS

- Actively participates in the Firm's business development efforts. Professionally markets the Firm's services to acquire new and expand existing clients.
- Enhances personal and Firm reputation by conducting seminars, making presentations at conferences and seminars, and/or writing articles for professional publications.
- Represents the Firm through participation in professional, charitable, and/or civic organizations.
- Participates and promotes Firm initiatives such as Business Development Program, Mentoring Program, and other Firm committees and activities.

SUPERVISORY RESPONSIBILITIES _____ Non-Exempt _____ Exempt

EDUCATIONAL REQUIREMENTS

- Bachelor's Degree in Business, Accounting, or Finance, or Master's Degree in Accounting.
- Minimum of forty hours (40) of annual continuing professional education (CPE).
- Participation in career development programs to improve managerial, communication, and interpersonal skills.

EXPERIENCE REQUIREMENTS

- Normally a minimum of five years (5) of public accounting or related business accounting experience demonstrating a progression in complexity, scope, and number of engagements managed.
- Demonstrated communication skills, both written and verbal, to effectively interface with all levels of Firm management and staff, clients, and outside business contacts.
- Ability to bring new business to the Firm.

REQUIRED LICENSES, CERTIFICATES, OR KNOWLEDGE

- A current and valid CA Certified Public Accountant's (CPA) License.
- A member in good standing with the AICPA and California Society of CPA's.
- Demonstrated use of computers, computer accounting software, and tax software programs.
- Valid California Drivers License and proof of insurance.

WORKING CONDITIONS

- Frequent same day travel for work at client offices, meetings, and seminars using a personal vehicle.
- Out-of-town travel with overnight stay for work at client offices, meetings, or seminars.
- Overtime work, as required, throughout the year.

SAFETY HAZARDS OF THE JOB

- Minimal hazards. General office working conditions.
- Lifting requirements of 20 pounds to carry audit bags, computers, and peripheral equipment to client locations.

EMPLOYER RIGHTS

This position description does not list all the duties of the job. Employees may be asked by supervisors, managers, or partners to perform other duties. Performance evaluations, in part, will be based upon performance of tasks listed in this position description.

The Firm has a right to revise this position description at any time. The position description is not a contract for employment. That is, employment with the Firm can be terminated with or without cause, and with or without notice, at any time, at the option of the employee or that of the firm.

Reviewed and Approved: _____

Date: _____