



Charlotte Office - Senior Tax Accountant

Summary of Responsibilities

The Senior Tax Accountant is given a wide variety of tax assignments under the supervision of different professionals. Performance is based on the quality of work, application of accounting knowledge, and ability to meet time constraints.

Soft Skills:

- Adheres to the firm's policies and procedures
- Limited to no review points on compliance work and planning
- Ability to train, mentor, and supervise new staff
- Takes the lead role in project management of routine client compliance work for tax engagements
- Demonstrates time management skills by meeting client deadlines, responsiveness to client and internal requests, etc.
- Ability to effectively communicate advisory skills to both the client and the internal project team

For Tax Engagements

- Takes the lead role in compliance elements of engagement:
 - Annual tax planning
 - Quarterly planning / estimates as required
 - Tax return completion
- Demonstrates ability to trace back taxable income to cash flow
- Ability to explain / deliver tax planning and tax compliance results to the client in a simple to understand manner.
- Ability to research and resolve tax notices.
- Ability to manage and resolve taxing authority audits and inquiries.
- Demonstrates proficiency with tax attributes of partnerships, corporations, and s-corporations (e.g. basis and associated limitations, deductible / non-deductible items)
- Demonstrates proficiency with specialized industries (e.g. construction) and associated tax benefits (e.g. credits, DPAD).
- Demonstrates proficiency with individual tax attributes (e.g. carry forwards, limitations)
- Ability to propose solutions to unfavorable tax problems / outcomes.

Business Development Skills

- Begin identifying and developing your own 'network'

Education, Experience, and Skills Required

- Bachelor's degree in accounting or master's degree in accounting
- 2 to 6 years of experience in accounting
- Minimum of 40 hours of continuing professional education is required each year
- Well-rounded knowledge of accounting principles and personal income taxes
- Ability to communicate clearly and concisely in English
- Either holds a current and valid certified public accountant's license, or is working toward obtaining the license by taking and passing the applicable state CPA exam