

## **Charlotte Office – Tax Senior**

### **Summary of Responsibilities**

A Tax Senior 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 less experienced teammates
- 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
- Minimum 3 years prior public accounting experience in a tax role
- Proven Project Management experience
- Excellent time management skills
- Minimum of 40 hours of continuing professional education is required each year
- Well-rounded knowledge of accounting principles and personal income taxes
  - Advanced tax preparation skills of 1120S, 1065, 1120, and 1040
  - Fundamental skills for detail review of 1120S, 1065, 1120, and 1040
- Excellent oral and written communication skills
- 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