JOHN G. ULLMAN & ASSOCIATES, INC.

COMPREHENSIVE FINANCIAL MANAGEMENT SERVICES

Tax Specialist, Corning NY

John G. Ullman & Associates, Inc. is seeking a Tax Specialist to join our Firm. This is an essential position in our company. Working from the Corning Office, the Tax Specialist is a leadership position that will utilize their trained knowledge in the tax field to prepare tax returns, review tax returns, provide leadership and guidance for tax planning, and train and mentor associates in a wide range of tax areas.

The Role:

The Tax Specialist will:

- Review tax returns in the Medium to High range of complexity and make recommendations on return preparation regarding accuracy and tax saving opportunities
- Prepare tax returns. Complexity can range from Medium to the most complex depending on experience.
- Assume a lead role in tax planning. This will include preparation and review of quarterly tax projections to determine appropriate amounts for quarterly estimates and/or withholdings as needed to achieve the desired outcome in the future filing of tax returns. Assist in situations for clients to include research and presentation/communication of potential tax related opportunities
- Preparation of other entities including but not limited to partnerships, trusts and gift tax returns as assigned
- Interact with clients to clarify questions and data for the preparation of tax returns and projections
- Maintain a good working relationship with clients and staff to enhance client satisfaction
- Work closely and proactively with clients and Financial Advisors in order to maximize planning opportunities
- Assume a Lead Role of a key function, area, or process for the Tax Department. Work independently with oversight by department management to effect change in the key area with focus on gaining efficiency, increasing productivity, and meeting or exceeding budget. Assemble team members to drive project success in this responsibility
- Train and mentor associates in a key function, area, or process as needed to enhance the skills and abilities of the team
- Respond to federal, state, and local correspondence received on behalf of assigned clients with almost no direction or review from senior members of the department
- Assist all staff with research of tax issues, special projects, use of tax software and other resources, and respond to taxing authority notices and audits
- Perform research in order to properly answer client and Financial Advisors queries concerning taxes as needed
- Keep current on applicable tax regulations, changes in code, court rulings, etc. Communicate updates to key members of the staff involved in Tax Planning and Tax Return Preparations

Qualifications

- Excellent academic record; four-year college degree required; graduate or advanced degree preferred
- CPA is strongly preferred
- Enrolled Agent required, unless your education and credentials exempt you from being certified.
- A minimum of 4-6 years of Tax Experience; experience reviewing tax returns and preparing complex tax returns is required; experience with fiduciary returns is preferred

- Excellent interpersonal and communication skills
- Proven track record as a self-starter, with high levels of intensity and motivation
- Demonstrated passion for providing exceptional client service
- Strong technical skills; experience working with tax specific applications including: ProSystem; BNA Income Tax Planner; IntelliConnect; and other Tax Research Tools and Software

Perks & Benefits:

- Ability to have long-lasting and visible impact on clients' lives
- Opportunity to be a part of the firm as we grow and expand to meet the current and future needs of our clients.
- Work for an organization that is strongly committed to ethics and values, offers a warm and welcoming environment, is flexible, and is supportive of training, development, and continuing education.
- Work with a group of talented and very experienced tax professionals, which includes licensed CPA's, Enrolled Agents and highly trained tax professionals.
- Comprehensive dental and health care benefits, life insurance, 401K, SEP-IRA
- Access to all JGUA portfolio management, financial planning, and income tax services for you and your family
- Regular company outings
- Community Involvement

About Us:

John G. Ullman & Associates is a different kind of wealth management company. Our "one firm" model provides high net worth individuals and families a single place to turn for all aspects of their financial lives, including financial planning, wealth management, and "special projects" catered to their unique needs. Our relationships with our clients are long-standing, often spanning decades and multiple generations. Our headquarters is in Corning, New York, in the beautiful Finger Lakes region, with a second office in Rhinebeck, in the Hudson Valley region of New York.

To Apply:

If you are interested in applying please e-mail a letter of interest and resume to Scott Schoonover at schoonovers@jgua.com . Please indicate you are applying for the Tax Specialist position and use reference code JGUA-TS