John G. Ullman & Associates, Inc.
Comprehensive Wealth Management

Tax Professional

John G. Ullman & Associates, Inc. is seeking a Tax Professional to join our Firm. This is an essential position in our company. Working from the Horseheads Office, the Tax Professional will focus on the preparation of tax returns at various levels of complexity; review tax returns, perform tax planning services; and assist in other functional areas of the Tax Department as needed.

The Role:

The Tax Professional will:

- Prepare tax returns; complexity can range from simple to the most complex depending on experience.
- Assume a role in the review tax returns in the Medium to High range of complexity and make recommendations on return preparation regarding accuracy and tax saving opportunities
- Assume a role in tax planning. This will include preparation 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 the tax return. Assist in situations for clients to include research and presentation/communication of potential tax related opportunities.
- Assume a role in 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 their financial advisor in order to maximize planning opportunities.
- Respond to federal, state, and local correspondence received on behalf of assigned clients.
- Assume a role in performing research to assist staff with tax issues, special projects, use of tax software and other resources, and in preparation to respond to taxing authority notices and audits.
- Perform research in order to properly answer client and financial advisor 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 Preparation.

Qualifications

- Excellent academic record; two-year college degree required, four-year college degree preferred; graduate or advanced degree strongly preferred.
- CPA is strongly preferred.

- A minimum of 1-3 years of tax experience; 4-6 years of tax experience which includes reviewing tax returns and preparing complex tax returns is preferred; experience with fiduciary returns is strongly preferred.

- We will consider a pending and/or recent graduate with a mixture of academic and internship training; preference will be given to pending and/or recent graduates from an accredited academic program that prepares graduates to sit for the CPA exam. Practical Tax experience would be strongly preferred.

- Must be willing and able to complete the requirements to receive the Enrolled Agent (EA) designation. An active Enrolled Agent (EA) designation would be preferred. A CPA is strongly 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 (PRO System); BNA Income Tax Preparer; Tax Research Tools and Software

Perks & Benefits

- Ability to have a long-lasting and visible impact on client's lives

- Opportunity to be 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, comprised of CPAs and Enrolled Agents (EA), with strong professional networks

- Comprehensive dental and health care benefits, life insurance, 401K, SEP-IRA

- Access to all JGUA portfolio management and financial planning services for you and your family

- Regular company outings

- Community Involvement

- Ability to have long-lasting and visible impact on clients' lives

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 located in Horseheads, New York; we also have an office in Corning, New York; both offices are located in the beautiful Finger Lakes Region. We also have an office in Rhinebeck, which is located 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, Director of Human Resources at HR@jgua.com. Please use Reference # JGUA-TP.