John G. Ullman
& Associates, Inc.
COMPREHENSIVE WEALTH MANAGEMENT SINCE 1978

Tax Associate

Are you interested in joining a dynamic Tax Team where you will have the opportunity to work with a group of very talented and experienced tax professionals? If so, we would like to explore the possibilities of having you join our team.

The Tax Associate is an essential position in our company. Working from the Horseheads Office, the Tax Associate is a professional position where you will have the opportunity to utilize your education, knowledge, training, and experience 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.

<u>The Role:</u>

The Tax Associate will:

- Prepare tax returns. Complexity can range from Simple to Medium, and occasionally complex tax returns depending on experience
- Assume a 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
- 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 Account Executives in order to maximize planning opportunities
- 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 Account Executives 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

- Learn how to review tax returns to ensure accuracy, as well as developing recommendations regarding tax saving opportunities.

- Learn how to prepare the tax returns of other entities including limited partnerships, trusts, and gift tax returns.

<u>Qualifications</u>

- Excellent academic record; four-year college degree required; graduate or advanced degree 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.
- A minimum of 2-3 years of Tax Experience; experience 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.
- 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: Pro System; BNA Income Tax Planner; Intelli-Connect; and other Tax Research Tools and Software

<u>Perks & Benefits</u>

- 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

About Us

John G. Ullman & Associates is a wealth management firm committed to bringing human connection, attention to detail and trust to every aspect of financial planning. For over 40 years, we have helped clients plan for a lifetime of financial security, creating highly customized financial plans to manage, grow, and protect our client's wealth. Our team has grown to include a diverse group of expert financial planners, tax professionals, investment researchers, legal professionals and support staff in three separate New York State Locations; including our headquarters located in Big Flats, NY; and branch offices located in Corning, NY and Rhinebeck, NY.

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-TA.