Tax Specialist

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 Specialist is an essential position in our company. Working from the Horseheads Office, the Tax Specialist will utilize their education, knowledge, training, and experience in the tax field to prepare a comprehensive range of tax returns, prepare complex tax returns the require very specific knowledge and training, 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 Specialist will:

- Prepare tax returns of other entities including but not limited to partnerships, trusts and gift tax returns as assigned

- Prepare tax returns. Complexity can range from Medium to the most complex depending on experience.

- 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 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

- 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

<u>Qualifications</u>

- 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: Pro System; BNA Income Tax Planner; Intelli-Connect; and other Tax Research Tools and Software

<u>Perks & Benefits</u>

- 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 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-TS.