



Tax Associate

John G. Ullman & Associates, Inc. is seeking a Tax Associate to join our firm. This is an essential position in our firm that will play a significant role in our strategic plans.

This is an exciting time to join our firm as we continue to grow. As a Tax Associate, you will have the opportunity to join a highly trained and experienced tax services team. Located in our Big Flats headquarters, the tax services team is a blend of CPA's, Enrolled Agents, and tax professionals working towards their tax professional designations.

In this position, you will have the opportunity to utilize your education, knowledge, training, and experience in the tax field to prepare tax returns, assume a role in tax planning, assisting staff with tax issues and client interactions.

Role:

- **Prepare Tax Returns:** complexity can range from simple to medium.
- **Tax Planning:** assume a lead role in tax planning. Prepare and review quarterly tax projections to determine quarterly estimates to achieve the desired outcome for future filing of tax returns.
- **Client Interactions:** to clarify questions and data for the preparation of tax returns and projections.
- **Research Tax Issues:** assist with research of tax issues, special projects, and preparing responses to taxing authority notices and audits.
- **Review Returns:** learn how to review tax returns to ensure accuracy.
- **Preparation of Other Entities:** learn how to prepare returns of other entities including partnerships, trusts, and gift tax returns.

Qualifications:

- 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: ProSystem; BNA Income Tax Planner; IntelliConnect; and other Tax Research Tools and Software

Job Description:

To view the full job description go to <https://jgua.com/taxassociate>

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.