



Tax Specialist

John G. Ullman & Associates, Inc. is seeking an experienced Tax Specialist 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 Specialist, 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, review tax returns, provide leadership and guidance for tax planning, and train and mentor associates in a wide range of tax areas.

The Tax Specialist will work on tax returns that require specific knowledge and training to complete, including tax returns of other entities such as partnerships, trusts, and gift returns.

Role:

- **Preparation of Other Entities:** including 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:** medium to high range and make recommendations on tax return preparation regarding accuracy and tax saving opportunities.
- **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.
- **Leadership Role:** assume a Leadership Role for one or more of the key functions to effect change in the key area to gain efficiency, increase productivity, and meet or exceed budget.
- **Train and Mentor:** associates in a key function, area, or process as needed to enhance the skills and abilities of the team.

Qualifications:

- Excellent academic record; four-year college degree required; graduate or advanced degree preferred
- Enrolled Agent is required, unless your education and credentials exempt you.
- CPA is strongly preferred.
- 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

Job Description:

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

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.