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

JOB DESCRIPTION

Position Title:	Tax Associate
Department:	Tax Services
FLSA Class:	Non-Exempt
Job Type:	Full Time
Standard Week:	40+ Hours Per Week
Reports To:	Vice President/Director of Tax Services

Job Summary: The Tax Associate is an essential position in our company.

Working from the Big Flats Office, the Tax Associate position will offer the opportunity to utilize their education, knowledge, training, and experience in the tax field. Responsibilities will include preparing tax returns, tax planning, assisting staff with tax issues, and client interactions as needed.

The Tax Associate will 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

The Tax Associate may also interact with clients to clarify questions and data for the preparation of tax returns and projections. Duties will include working proactively with Advisors and clients to maximize planning opportunities, as well as maintaining a good working relationship with clients and staff to enhance client satisfaction.

Job Duties
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 Advisors 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 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 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.

Required Qualifications:

- Excellent academic record, four-year college degree, graduate or advanced degree preferred.
- Must be willing and able to complete the requirements to receive the Enrolled Agent (EA) designation.
- Currently an Enrolled Agent is preferred.
- CPA is strongly preferred.
- A minimum of 2-3 years of Tax Experience, experience reviewing tax returns and preparing complex tax returns is required, experience with fiduciary returns is 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 with Microsoft Office (Word, Excel, PowerPoint, Outlook).
- Experience working with tax specific applications is required.
- Experience working with Pro System, BNA Income Tax Planner, Intelli-Connect, and other Tax Research Tools and Software is preferred.

Equipment, Software and Materials Used:

- Microsoft Office (Word, Excel, PowerPoint)
- Outlook (Email and Scheduling)
- Industry Specific Information Systems
- Tax Specific Applications (Pro System, BNA Income Tax Planner, Intelli-Connect)
- Information Databases
- Remote Access Meeting Applications.