



JOB DESCRIPTION

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

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

Working from the Big Flats Office, the Tax Specialist position will offer the opportunity to utilize their education, knowledge, training, and experience in the tax field. Responsibilities will include preparing a comprehensive range of tax returns, preparing complex tax returns the require very specific knowledge and training, reviewing tax returns, providing leadership and guidance for tax planning, and training and mentoring team members in a wide range of tax areas.

In addition to working on general tax returns, the Tax Specialist will utilize their education, knowledge, training, and experience to prepare tax returns of other entities including but not limited to partnerships, trusts, and gift tax returns; as assigned.

The Tax Specialist will 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

The Tax Specialist 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 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 complexity range and make recommendations on tax return preparation regarding accuracy and tax saving opportunities.

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| 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 Advisors in order to maximize planning opportunities. |
| Assume a leadership role for one or more of the key functions, areas, or processes for the Tax Services Department. Work independently with oversight by department management to effect change in a key area with focus on gaining efficiency, increasing productivity, and meeting or exceeding the budget. Assemble and guide 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 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. |

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| <p>Required Qualifications:</p> <ul style="list-style-type: none"> • Excellent academic record, four-year college degree, graduate or advanced degree preferred. • Enrolled Agent is required, unless your education and credentials exempt you from being certified. • 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 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. |
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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.