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

JOB DESCRIPTION

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

Job Description: The Tax Supervisor is an essential position in our company.

Working from the Big Flats Office, the Tax Supervisor is a leadership position that will offer the opportunity to utilize their education, knowledge, training, and experience in the tax field. Responsibilities will include reviewing tax returns, preparing tax returns, providing leadership and guidance for tax planning, preparation of other entities (partnerships, trusts, and gift tax returns), and training and mentoring members of the team as needed.

The Tax Supervisor will 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.

The Tax Supervisor 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
Review tax returns in the Simple to Medium complexity range, and occasionally review Complex tax returns as knowledge and experience increases. Make recommendations on tax return preparation regarding accuracy and tax saving opportunities.
Prepare tax returns. Complexity can range from Medium to the most complex depending on experience.
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.
Preparation of other entities including but not limited to partnerships, trusts and gift tax returns as assigned.
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.

Required Qualifications:

- 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 5-7 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.

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.