



Job Description:

Individual Tax Supervisor/Manager

Definition

An individual tax supervisor/manager, having proven leadership abilities at the senior preparation level, assumes supervision of lower-level staff and accepts increasing responsibility for individual tax engagements while maintaining solid client relationships. They demonstrate effective supervision, a strong commitment to the firm, and perform work on all levels of individual tax engagements with little supervision.

Reporting to: President and Vice Present

Hours: Part Time to Full Time, flexibility in summer months, overtime required during tax season, remote working options available

Compensation: Based on qualifications and experience, average range \$75k-\$95k annually

Performance expectations

An individual tax supervisor/manager is expected to:

- Take charge of all individual tax engagements with the exception of the unusual or extremely complex (this includes responsibility for decisions and delegation of work to lower-level staff)
- Take responsibility for examining staff work including individual tax returns, preparation financial statements, and work papers, as well as supervising the staff and making sure to delegate effectively and assure training procedures are followed
- Communicate effectively all aspects of work performed to clients, staff, managers, and partners (this includes both oral and written communication)
- Work directly with clients to meet their needs, while communicating status of all clients to partners
- Handle individual tax engagements, regardless of complexity, in an efficient, timely and professional way
- Make sure that work is completed promptly and within predetermined budgets and bill clients for individual tax engagements (those not included in tax prep billing)

Assignments

An individual tax supervisor/manager is responsible for most individual tax engagements. Duties may include the following:

- Supervising staff, delegating portions of individual tax engagements, and taking responsibility for decisions relating to individual tax engagements
- Distributing work load to ensure maximum staff productivity, ensuring that lower-level staff work is performed by appropriate personnel, and assisting in supervising subordinate work schedules

- Assuming responsibility for administrative functions including billing, input to staff evaluations, budget preparation, staff training and recruiting, and contributing to and communicating the firm's policies to staff members
- Demonstrating capacity in delivering special client services, such as projections and analysis while demonstrating clients earned trust and ability to sell existing client services and attract new business to the firm
- Working with minimal supervision and identifying major problems and potential solutions to discuss with partners before making decisions

Professional development

- An individual tax supervisor/manager is expected to develop professionally by:
- Acting as a staff mentor by providing guidance and serving as a professional role model
- Becoming more conscious of the need to increase the firm's growth through new business, such as identifying new services that may be sold to clients, and continuing to attempt to attract new clients
- Continuing to promote the firm's image through participation in civic, professional, and business organizations, including speaking engagements and seminars
- Promoting the firm to increase profits by writing for professional publications and participating in civic, business, and professional organizations
- Learning new technologies that the firm introduces into the work environment

Educational requirements

An Individual tax supervisor/manager should possess a minimum of a B.A. degree in accounting, required licenses, certificates, demonstrated knowledge of advanced accounting and tax principles, demonstrated strong supervisory/ management and communication and interpersonal skills, and proficiency in use of accounting, spreadsheet, word processing, database and tax processing computer software.

What makes an ideal candidate?

- Individual tax supervisor/manager requirements:
- CPA Licensed OR appropriate credentials and work experience
- 5-7 years' recent experience in public accounting or equivalent work
- Ability to communicate verbally and in writing
- Social Media use with LinkedIn, Facebook, etc.
- Networking ability & awareness of representation of the firm
- Working knowledge of QuickBooks, ability to obtain certification

*Preferred candidates will have experience with tax preparation software (such as Ultra Tax), small business accounting programs (such as QuickBooks) financial statement write up software (Such as Accounting CS) and client database and workflow systems (such as OfficeTools).

Experience in reviewing staff's financial statement preparation and tax preparation.

Notes

Every employee works for Gray CPA, Inc., not only for a particular supervisor or department. Accordingly, employees are expected to act in the best interests of the firm, even if doing so requires actions or responsibilities not listed in the above job description. This job description is provided for informational purposes only and is subject to revision by management when client service needs change.