FREDRICKZINK & Associates, CPAs
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This is how we CPA™

Job Title: Senior Tax Accountant

FLSA Status: Exempt
Reports To: Tax Director

Supervisory Responsibilities: No direct supervisory responsibilities. Provide clear guidance and training to others and effectively delegate tasks. Often lead one or more team members, instruct them on work to be performed, review the work done, and direct necessary revisions.

Summary: This position is responsible for organizing, conducting, reviewing, and evaluating the work on engagements to prepare and review individual, corporate, partnership, fiduciary, nonprofit, and estate tax returns as well as provide financial and estate planning. An individual at this level is directly involved with the client relationship and planning process by directing associates, reviewing returns and providing additional services to clients. The role requires a genuine interest in developing a comprehensive understanding of the client's business and tax environment. It requires active communication with clients to manage expectations and ensure satisfaction while providing recommendations on return preparation, regarding accuracy and tax savings opportunities. This individual makes decisions on all but the most unusual tax matters and accepts all responsibility for routine engagements. Performance is judged on the quality of work, application of accounting knowledge, and ability to meet time constraints.

Billable Hours Goal: 1500
Annual CPA CPE Requirement: 40
Annual Salary Range: $65,000-$78,000 DOE

Essential Duties:

- Perform all aspects of client fieldwork relating to tax engagements under the direct supervision of senior team members and above.
- Possess and apply a solid understanding of accounting principles as they relate to individual client assignments.
- Possess a general understanding of various services the firm provides and articulate them to clients.
- Research simple to complex tax matters.
- Analyze and formulate tax planning strategies to satisfy client business and tax objectives.
- Prepare individual, corporate, partnership, fiduciary, nonprofit, and estate tax returns.
- Conduct frequent internal communication to ensure that owner or manager in charge, supervisor, and subordinates are informed of job status, problems, and additional service opportunities.
- Direct and instruct other team members on engagements including the delegation of duties.
- Develop one-on-one relationships with key client employees and become the main source of client interaction throughout the year for assigned engagements.
- Develop a personal network to assist the firm in achieving practice development and marketing goals by identifying new business opportunities with existing clients.
- Prepare in house training programs, including CPE, to train other team members.
- Attend functions and events that promote the firm with clients, potential clients, and peers.

Job Qualifications:

- Minimum of a Bachelor's Degree in Accounting.
- Five to seven years of prior public accounting experience, or equivalent.
- Certified Public Accountant or working towards certificate.

Skills:

- Proficient computer ability relative to Microsoft office suite, spreadsheets, tax preparation software, trial balance software, time entry, word processing, and internet research.
- Knowledge of professional pronouncements such as GAAS, and GAAP.
- Understanding of the general ledger accounting structure.
- Ability to analyze and reconcile accounting data.
- Possession of strong organizational and detail-oriented skills.
- Effective written and verbal communication skills.
- Ability to work independently on assigned task as well as to accept direction on given assignments.
- Able to work effectively with partners, staff members, and clients.