FREDRICKZINK & Associates

A professional corporation. | **CPAS**

Job Title: Tax Manager

FLSA Status: Exempt

Department: Tax

Reports To: Partner

Supervisory Responsibilities: Responsibilities include interviewing and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; and addressing complaints and resolving problems.

Summary: This position shares responsibility with management team for organizing, conducting, reviewing, and evaluating the work on engagements to prepare and review individual, corporate, partnership, fiduciary, nonprofit, and estate tax returns. An individual at this level makes decisions on all but the most unusual tax matters and accepts 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
CPA CPE Requirement: 40

Essential Duties:

Perform all essential duties of a Senior Accountant in Tax.

- 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 insure 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.

Essential duties of all professional team members:

- Follow regulations and professional ethics of the AICPA and state society.
- Respond to existing client inquiries and requests within one business day.
- Adhere to engagement budget constraints and complete assigned tasks within the time requested.
- Strive to attain realization goals.
- Conduct oneself in a professional manner at all times.
- Follow Firm procedures as outlined in employee handbook.
- Maintain confidentiality of the firm and its clients at all times.
- Maintain regular attendance and punctuality.
- Maintain accurate and timely records of hours worked.
- Possess and articulate a general understanding of various services the firm provides to current and prospective clients.
- All other duties as assigned by management.

Every employee works for FredrickZink & Associates, PC, not for any particular supervisor or department. Accordingly, employees are expected to act in the best interest of the company, even if doing so requires actions or responsibilities not listed in the above job description.

THIS JOB DESCRIPTION DOES NOT CONSTITUTE A CONTRACT FOR EMPLOYMENT

I acknowledge that I have had the opportunity to review my job description, to discuss it with my supervisor, and clarify any area contained within. I understand that this job description is a general overview of my job responsibilities and that I may be asked to perform other duties from time to time as deemed necessary by management. I acknowledge that nothing contained within this job description changes my status as an employee-at-will or in any way restricts the Firm's right to terminate an employee or change their terms or conditions of employment.

_____   _____
Employee Name (Print)   Date

_____
Employee Signature