
JOB DESCRIPTION

SENIOR TAX MANAGER

Definition

A Senior Tax Manager is able to maintain solid client relationships, effectively supervise staff, demonstrates a strong commitment to the firm. A Senior Manager will have strong firm leadership with a focus on managerial, administrative and promotional procedures while assuming primary client responsibility and maintaining a strong billing center. Responsibilities are performed personally or through direct reports. A Senior Manager must be a CPA with a minimum of seven years experience with our firm or equivalent experience. They must be proficient in all areas of the practice. They also assume secondary responsibility for client relations.

Reports to: Partner

Performance expectations

- ❖ Handle all client engagements, regardless of complexity, in an efficient, timely, and professional way. Assume client responsibilities from retiring partners
- ❖ Manage billing center responsibilities: client communication/relationships, time budgets and billing and collection
- ❖ Assume all responsibility for engagements, including deadlines, planning, supervision and other decisions.
- ❖ Maintain regular contact with clients, striving to identify and meet their needs efficiently and effectively.
- ❖ Demonstrating the capacity to earn client's respect and trust, providing opportunities to sell existing clients new services and attract new business to the firm.
- ❖ Supervise all staff members, including making sure to delegate work effectively and ensure that training procedures are followed.
- ❖ Participate in education programs as an instructor or discussion leader.
- ❖ Ability to train, supervises, review and evaluate work of staff.
- ❖ Have command of financial engagements and taxes.
- ❖ Participate in selected partner meetings.
- ❖ Comply with all peer review requirements.
- ❖ Maintain high professional standards and displays a high level of professionalism. Earns the respect and trust of clients.
- ❖ Be a significant leader and team player in the Firm
- ❖ Become more detail focused.
- ❖ Demonstrating leadership characteristics and developing Partner-in-Training attributes.
- ❖ Maintain professionalism
 - Be supportive of the Firm
 - Maintain confidentiality of Firm issues
 - Be prepared and maintain the image of the firm
 - Maintain commitment to the firm

Assignments

- ❖ Assumes full responsibility for tax department. Manages tax updates, extension process, review of tax returns.
- ❖ Trains office on new tax pronouncements and regulations.
- ❖ Exhibiting strong written and oral communication skills by disseminating information to staff at all levels of the firm, as well as partners and clients.
- ❖ Manages supervisors, managers and staff confidently and professionally
- ❖ Serves as a role model
- ❖ Manage the performance review process (initiates process, follow-up and setting up evaluation meeting)
 - Mid year (November) and Year end (May)
- ❖ Preparing engagement budgets.
- ❖ Preparing client billing.
- ❖ Effectively using technology and properly applying computer software.
- ❖ Working with minimal supervision and identifying major problems to discuss with partners before making decisions.

Professional development

Senior Managers are expected to develop professionally by:

- ❖ Getting involved in the Wilmington Community.
- ❖ Developing and strengthening expertise in a niche.
- ❖ Meet with bankers and attorneys in the Wilmington area to help develop Firm.
- ❖ Aligning professional development with the Partner-in-Training criteria.
- ❖ Embracing and applying the principles presented in the firm's Professional and Leadership Development program.
- ❖ Promoting the firm to increase profits.
- ❖ Delivering marketing presentations, accepting speaking engagements and writing articles for publication.
 - ❖ Participating in civic, business, and professional organizations.
 - ❖ Establishing contact with professionals (e.g., doctors, lawyers, bankers, and realtors).
 - ❖ Learning new technology the firm introduces into the work environment.

Essential job functions

- ❖ Stay up to date with technical issues. Attend training to further develop technical skills related to Individuals, corporations, s-corporations and partnerships
- ❖ Develop a core competency (ie construction, estate planning, financial planning)
- ❖ Ability to work at a computer for extended periods when required.
- ❖ Ability to efficiently tear down and set up laptop hardware.
- ❖ Responsible for the care and handling of computer hardware and other office equipment.
- ❖ Learn and apply computer software programs.
- ❖ Ability to personally lift and move objects weighing up to 55lbs.
- ❖ Manage effectively the physical and emotional demands of tax season.
- ❖ Drive a personal car to clients and other engagements.
- ❖ Take detailed notes and maintain organized files.
- ❖ Maintain positive relationship with clients.

Educational requirements

Minimum of a B.A. degree in accounting, required licenses, certificates, demonstrated knowledge of advanced accounting and tax principles, strong management and communication and interpersonal skills, and proficiency in related tax accounting, spreadsheet, and work processing software.

Every employee works for Wheeler, Wolfenden & Dwares, PA, not just for a particular supervisor or department. Accordingly, employees are expected to act in the best interest of the firm, even if doing so requires actions or responsibilities not listed in the above job description.

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