



# **HORTY**

*Your Partner for Success*

## **TAX MANAGER**

**DEPARTMENT:** TAX

**CLASSIFICATION:** FULL-TIME, EXEMPT

**REPORTS TO:** DIRECTOR/TAX DEPARTMENT DIRECTOR

**SUMMARY:** The Tax Manager is responsible for the efficient, accurate, complete and timely preparation of client tax returns. Advanced technical skills in a variety of tax and accounting areas, along with well-developed and applied management supervisory skills are required.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:** Include the following, but are not limited to, and are required to perform this job successfully. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Performs technical tax review and approval of all tax returns and governmental tax examinations of any complexity.
- Assumes full responsibility for larger tax returns and delegates to the various tax preparers as deemed necessary.
- Delegates and manages tax research projects to achieve an accurate and efficient product.
- Participates actively in client meetings and tax planning efforts to assist the Auditing and Accounting Department with larger clients.
- Acts as a resource for tax preparers/specialists and A&A staff on specific tax issues and/or questions.
- Assumes tax preparation responsibility for the more complex business returns.
- Assumes client service responsibility for clients the tax manager works directly with or clients where the responsibility is delegated from the partner.
- Communicates to the appropriate firm personnel important tax developments affecting the firm's clients.
- Delegates and manages governmental tax examinations; may represent the client before the appropriate taxing authorities.
- Maintains familiarity with qualifications of all tax staff members; reviews staff assignments for appropriateness.
- Supervises tax staff and provides on-the-job training.
- Works to develop responsible, trained staff by assisting in recruiting, performance evaluations, developing training aids, and acting as an instructor in professional development programs.

- Assumes responsibility for smooth flow of tax returns through the tax preparation system to assure accurate, complete and timely preparation and delivery of all clients' tax returns.
- Possesses a complete knowledge of the firm's philosophy and its opinions on tax matters.
- Maintains a knowledge of general economic and political trends of possible tax or other legislation that could affect the business climate.

**OTHER FUNCTIONS:**

- Prepares other reports and projects as requested from time to time by the partners.
- Participates in firm's practice development efforts through involvement with referral sources, community and industry activities.
- Performs such other duties as may be assigned.

**REQUIRED EDUCATION and EXPERIENCE:**

- Bachelor's Degree (B.S.) in Accounting from a four-year College or University.
- Minimum of seven (7) years experience in public accounting, demonstrating a proven progression in tax return complexity, scope and research.
- Minimum of two (2) years experience representing clients before taxing authorities.
- Minimum of one (1) year experience supervising and directing work of tax preparers.

**REQUIRED CERTIFICATES, LICENSES, KNOWLEDGE or SKILL:**

- Current and valid certified public accountant's license.
- Must be a member in good standing with the American Institute of CPAs.
- Proficiency in use of computer tax preparation, tax research and tax planning software programs.

**PHYSICAL REQUIREMENTS:** All of the physical requirements listed below are those that may be necessary for an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Sitting; standing; walking or moving throughout facility; driving (and valid driver's license); talking; seeing (specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus); hearing; feeling; bending or stooping; squatting or crouching; reaching; kneeling; pushing; pulling; lifting up to 25 lbs.
- Minimal safety hazards; general office working conditions.

**WORK ENVIRONMENT:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The working environment changes with the client and the professional services provided for that client. A significant percentage of time will be spent indoors in an office atmosphere. Occasionally client work could be outside, in a warehouse, on factory floors, etc., if necessary.

- Frequent same-day travel, using a personal vehicle, for work at client's offices, meetings or seminars.
- Occasional out-of-town travel, using a personal vehicle or firm provided transportation, with overnight stay for work at clients, meetings or seminars.
- Occasional overtime is required throughout the year.
- Heavy overtime work is required from February 1 through April 15 ("busy season") and may be in excess of 55 hours per week. Additional policies may be put into effect during busy season, *i.e.*, no vacation or non-emergency-related personal time away from the office.

This job description does not list all the duties of the job. You may be asked by Supervisors, Managers or Directors to perform other instructions and duties. You will be evaluated in part based upon your performance of the tasks listed in this job description.

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