CREATIVE PLANNING

Title: Tax Director

Location: Remote

Job Description: **JOB SUMMARY**

The primary responsibilities of the **Tax Director** is to provide proactive strategic advice to every CPT client in their practice, prepare returns accurately and efficiently and to answer all questions the same day or provide a timeline for an answer.

Creative Planning Tax, LLC is a part of Creative Planning, Inc. and works in conjunction with wealth managers to provide tax consulting and compliance services. The tax department is a fun group of driven and dedicated professionals. We are looking for tax accountants who love client service but don't like the headaches of a traditional public accounting firm, such as hourly billing and tracking your time. We offer a great work/life balance, autonomy, and the chance to work directly with a wide variety of clients.

The **Tax Director** will work directly with clients to prepare and deliver income tax returns as well as consult on any questions or planning with the wealth managers. They will be responsible for their own group of advisors to support as well as their own book of tax returns to prepare.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES:

- Reviews & finalizes tax returns for a large volume of tax clients, including individuals, trusts, and businesses
- Responsible for clear & concise communication with clients on all matters including delivery of income tax returns
- Responsible for timely & accurate responses to questions, estimates, projections, etc. with both tax and wealth management clients
- Maintains accurate list of returns in CRM, including status, fee, collections, etc.
- Stays up to date on tax law changes and is able to communicate the effects of the law changes to clients
- All other duties as assigned

REQUIRED EXPERIENCE/QUALIFICATIONS:

- 4 years of public accounting experience
- CPA License

PREFERRED EXPERIENCE/QUALIFICATIONS:

- Master's Degree in income taxation
- Experience with high-net worth individuals and/or trusts
- Experience handling a large volume of returns/clients

TECHNICAL SKILLS:

- Understanding and previous use of Windows 10
- Proficiency in MS Excel and Word
- Ability to quickly learn and adapt to new systems and technology
- Previous use of ProSystem Fx or CCH Axcess Tax preferred, but not required

To inquire about this position or other Creative Planning career opportunities:
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