CREATIVE PLANNING

Title: **Tax Director**

Location: Any Location/Hybrid/Remote

OVERVIEW

BerganKDV recently joined Creative Planning, one of the nation's top independent wealth management and investment advisory firms, also providing a comprehensive suite of consulting, tax and advisory services for business and institutions. This is a unique opportunity to join a top tier firm paving the way for unparalleled client and team member experiences.

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

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 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.

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.

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

EXPLORE THE WORKPLACE OF THE FUTURE

Together, we are building the nation's preeminent wealth and business advisory practice, by providing a comprehensive suite of services that support and empower individuals, families, institutions and businesses. Our values drive our decisions, and our passion is putting our clients at the center of everything we do.

Creative Planning Differentiators:

- Day One Benefits Enrollment
- Growth Potential
- Close-Knit Collaborative Team
- Mentor Program
- Employee Referral Rewards
- Comprehensive Benefits Package
- Customized Career Paths
- Open Door Leadership Style
- Firm-wide Trips for All Team Members
- Creative Planning Cares

BENEFITS THAT GO BEYOND

We are proud to offer a competitive and comprehensive benefits package, with options designed to help you make the best decisions for yourself, your family and your career. Our competitive compensation package is catered to reward you for your performance and recognize you for the value you bring to our business. In addition, our total package includes medical and dental coverage, matching 401(k) plans, PTO, observed holidays and a range of programs and benefits designed to support your physical, financial and social well-being.

Creative Planning is an equal opportunity employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

We will ensure that individuals with disabilities are provided reasonable accommodation to participate in the job application or interview process, to perform essential job functions, and to receive other benefits and privileges of employment. Please contact us to request accommodation.