



Title: **Tax Supervisor**
Location: Bloomington, MN

JOB SUMMARY

The **Tax Supervisor** works to provide excellent tax preparation, review and ancillary services in all client engagements including direct client involvement and relationship building. A Tax Supervisor will seek opportunities for growth and mentorship and is an active participant in firm initiatives.

JOB DUTIES

- Deliver a full range of specialized tax, compliance and consulting services in compliance with laws, regulations and timelines.
- Keeps current on and applies basic accounting standards and education; identifying and mitigating tax risks.
- Accountability in the workflow for client engagements ensuring quality completion of all work. Providing innovative tax planning, identifying and mitigating tax risks
- Acts as a resource for staff and senior accountants, providing feedback and offering guidance and direction.
- Understands and adheres to client confidentiality standards; demonstrating awareness of firm's risk management policies and procedures, by identifying and referring ethical, independence and conflict issues to manager and/or partner.
- Build authentic relationships with clients through all interactions. Work to identify areas where Creative Planning can further their business and goals.
- Actively seek opportunities to join business development meetings with the goal to build strong relationships and drive new client projects and revenue.
- Explore industry specialization and industry focused service. This may include attending peer group meetings or industry organization involvement.
- Be a resource for other members of the tax team. This may include technical training and providing feedback on client engagements.
- Support the growth and professional development of yourself and your Creative Planning teammates by participating in firm sponsored trainings, CPE courses, internal committees, and mentorship opportunities.
- Communicate effectively with your team striving for open and honest dialogue in all interactions.

REQUIRED EXPERIENCE / QUALIFICATIONS

- A bachelor's degree in accounting or related field of study or master's degree in taxation
- CPA certification; highly preferred
- 4+ years of professional services experience with a record of high achievement a plus
- Excellent interpersonal skills
- Strong written and verbal communication skills
- Strong analytical, teamwork and organizational skills
- Integrity, maturity, dependability, a positive attitude and a strong work ethic
- PC proficiency, including spreadsheet, word processing and presentation software applications
- Analytical skills with high detail orientation
- Research and understand professional frameworks, standards and guidance

- Technology and tools best practices including tax software
- Quality control
- Risk assessment, analysis and management
- Measurement analysis and interpretation
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