

Title: **Tax Director**  
Location: **St. Cloud, MN**

### **JOB SUMMARY**

The Creative Planning Business Services Tax Director provides high quality tax services to all external clients, executes on engagements, and is a strong leader in the firm's CPA Services Team. The Tax Director delivers a full range of specialized tax, compliance, and consulting services. Building strong client relationships to be a valued partner for our clients.

### **JOB DUTIES**

- Signs all levels of tax returns and projections
- Delivers full range of tax services
- Strengthens 'center of influence' relationships & asks for referrals
- Manages full client relationship of client group, client expectations, and workflow
- Develops internal CPE content
- Engages in client discussions about strategic tax topics
- Provides timely & accurate responses to clients
- Strives for an advisory relationship in every client interaction, always seeking opportunities for clients to further their business goals
- Develop and execute a networking strategy to meet new prospects and maintain an industry focus
- Provides open communication to all staff to promote a positive learning environment
- Effectively communicates work expectations to staff & management team
- Demonstrates complete knowledge for firm policies on financial matters: billing, AR, budgets, time reporting, engagement, & profitability
- Maintains current knowledge on accounting standards and provides training to team members
- Develops & grows team members skills
- Attends and participates in related weekly/monthly meetings
- Effectively manage multiple deadlines

### **REQUIRED EXPERIENCE / QUALIFICATIONS**

- 10+ years of Tax experience
- A bachelor's degree in accounting or related degree
- CPA Certified
- Master's Degree in Tax or Finance strongly recommended
- PC literate: basic software applications: Word, Excel, Internet, etc.
- Experience leading or managing a team

### **TECHNICAL SKILLS**

- MS Office /Windows experience particularly financial modelling and data management in Excel
- Strong analytical and problem-solving abilities
- Excellent written and verbal communication skills