



Title: **Tax Manager – Credits and Incentives**

Location: Any Location/Hybrid/Remote

JOB SUMMARY

The Creative Planning Business Services Tax Manager works with Tax Directors to provide high quality tax services to all external clients, execute on engagement scheduling, and is an active participant in identifying areas of process improvement while being a leader in the Firm's Tax Department. The Tax Manager plans, supervises, and performs reviews for all levels of business & individual returns while ensuring our clients experience excellent service through their deep technical knowledge and advanced business development skills.

JOB DUTIES

- Manages full client relationship of client group, client expectations, and workflow
- Brings tax savings opportunities to clients
- 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
- Attends and participates in related weekly/monthly meetings
- Effectively manage multiple deadlines

REQUIRED EXPERIENCE / QUALIFICATIONS

- 8+ 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