



CREATIVE PLANNING

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

Location: Any Location/Hybrid/Remote

JOB SUMMARY

The Tax Staff is responsible for duties including but not limited to organizing & coordinating client's data for the accurate, timely completion of business and individual tax returns. Assisting with providing tax preparation and ancillary services to the Creative Planning Business Services tax practice.

JOB DUTIES

- Responsible for the preparation of individual, corporation, partnership, fiduciary and other tax returns under supervision.
- Prepares basic work papers, including clear and concise documentation.
- Keeps current on and applies basic accounting standards and education.
- Effectively follows instruction and meets time budgets and deadlines for assigned areas and projects.
- Understands and adheres to client confidentiality standards.
- Develops open and cordial oral and written communication with appropriate client personnel to facilitate good relations and exceptional client service.
- Develops basic understanding of client's business to identify issues and provide constructive service suggestions.
- Develops understanding of service offerings within, and across lines of service to identify opportunities to meet client's needs.
- Actively seek opportunities to join business development meetings to learn more about client advisory and foster internal and external relationships. to meet client's needs.
- Support the growth and professional development of yourself and your Creative Planning teammates by participating in company 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

- Bachelor's degree in accounting or related field of study
- CPA certification in process preferred
- 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

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