



Title: **Tax Director**

Location: Waterloo, IA

JOB SUMMARY

The Creative Planning Business Services **Tax Director** plays a key leadership role in managing the firm's income tax engagements, ensuring high-quality service delivery, client satisfaction, team development, operational excellence and practice growth. Working closely with the Tax Managing Director, the Tax Director oversees complex engagements, drives business development and mentors staff to maintain strong client relationships and uphold the firm's culture.

JOB DUTIES

QUALITY

- Lead the preparation, review and delivery of complex tax returns and advisory work, ensuring technical accuracy.
- Participate in internal inspections or quality reviews as assigned.
- Demonstrate timeliness and compliance with firm policies on financial matters: billing, accounts receivable, budgets, time reporting, engagement, and profitability and hold the team accountable to these standards.
- Implement and uphold quality management processes within the team.
- Stay current with tax laws and regulations; communicate updates effectively to the team.
- Provide technical guidance to staff and assist in resolving moderate-to-complex tax issues.
- Participate in developing internal CPE content.

CLIENT EXPERIENCE

- Serve as the primary contact for a portfolio of key clients, managing communication and expectations.
- Support client relationship-building initiatives through regular check-ins and value-add touchpoints to maintain a high level of client retention.
- Assist in onboarding new clients and defining engagement scope and deliverables.
- Operate with a client-first mentality to exceed client expectations and generate referrals.
- Deliver proactive tax planning advice aligned with client goals and risk profiles.
- Monitor deadlines and keep clients informed of engagement progress and key milestone dates.
- Address client questions and concerns promptly and escalate complex matters to the Managing Director when needed.
- Collaborate with client accounting, audit, advisory, and other teams to deliver integrated service.

PRODUCTION

- Manage a portfolio of complex tax engagements, ensuring deadlines, budgets, and quality standards are met.
- Oversee day-to-day tax engagement execution to ensure quality, timeliness, and budget compliance.
- Identify operational challenges and suggest process improvements.
- Develop and implement engagement budgets, workplans, pricing structures and assist with resource allocation.
- Ensure team compliance with firm processes and use of technology tools and

support implementation of new software, automation tools, and workflow efficiency.

- Lead regular production meetings and manage workload distribution to leverage work appropriately, monitor engagement progress and resolve bottlenecks.

GROWTH & BRAND

- Achieve personal and assist with the team's growth goals.
- Model a growth mindset by providing referrals to other Creative Planning services.
- Develop and execute a personal brand strategy to identify opportunities within new and existing client relationships.
- Support business development initiatives, including pitches and proposals.
- Represent Creative Planning at community and industry events.
- Maintain a professional network with center of influence relationships, actively seeking, making, and exchanging referrals.
- Mentor staff on how to identify growth opportunities and enhance client Relationships.
- Collaborate with others on content creation (e.g., articles, webinars) that enhance the firm's reputation.

CULTURE

- Model Creative Planning values.
- Provide and ensure open communication with all team members to promote a positive learning environment that focuses on trust, transparency, and accountability.
- Lead with a disposition of optimism and encouragement by being a role model and mentor team members.
- Help team members achieve their goals through training, coaching and development.
- Foster a supportive, respectful, and collaborative team environment and atmosphere that attracts and retains top talent.
- Provide clear, timely, and respectful feedback to team members at all levels.
- Drive purpose, connection, and meaning in the work while managing the team's work-life harmony.

REQUIRED EXPERIENCE / QUALIFICATIONS

- Active CPA Certification
- 10+ years of Tax experience including a strong track record of working with closely held business entities
- Demonstrated expertise in complex tax compliance, planning, and advisory
- Bachelor's degree in accounting or related degree

TECHNICAL SKILLS

- History of signing income tax returns of complexity while meeting quality standards
- Strong technical knowledge of complex tax matters, including understanding and application of IRS and State tax codes
- Proficient in Microsoft Office Suite
- Familiarity with tax software, project management tools, and emerging technologies
- Excellent analytical skills and problem-solving abilities
- Proven experience in leadership, team building, and communication skills

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