



Title: **Tax Director - Cost Segregation**

Location: Any Location/Hybrid/Remote (Travel to client site required; Midwest)

JOB SUMMARY

The Creative Planning Business Services **Tax Director** plays a key leadership role in managing the firm's Cost Segregation practice ensuring high-quality service delivery, client satisfaction, team development, operational excellence and practice growth. Working closely with the Specialty Tax Team, 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 and manage all aspects of cost segregation studies from initial scoping through final deliverables
- 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 on tax regulations, IRS guidance, and industry best practices
- Provide technical guidance to staff and assist in resolving moderate-to-complex issues.

CLIENT EXPERIENCE

- Develop and maintain strong client relationships, serving as a trusted advisor
- 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.
- 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 tax, audit, and other Creative Planning teams to identify and deliver integrated solutions

PRODUCTION

- Review and approve engineering-based cost segregation reports to ensure accuracy and compliance with IRS guidelines
- Serve as a technical resource on depreciation strategies, fixed asset classification, and tax planning opportunities

- Manage a portfolio of engagements, ensuring deadlines, budgets, and quality standards are met.

- Oversee day-to-day engagement execution to ensure quality, timeliness, and budget compliance.
- Identify operational challenges and suggest process improvements.
- Develop and implement 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.
- Frequent travel to client sites is needed to support project execution and maintain strong client relationships. (travel expectations may vary based on client location and project scope)

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 or engineering license
- 8+ years of experience in cost segregation, fixed asset consulting, or related field
- Strong knowledge of IRS cost segregation methodologies and audit techniques
- Bachelor's degree in accounting, engineering, construction management, or related degree

TECHNICAL SKILLS

- Experience with large, complex real estate projects
- Familiarity with ASC 3115, depreciation methods, and tax accounting methods
- Ability to translate technical concepts into client-friendly insights
- Proficient in Microsoft Office Suite
- Familiarity with tax software, project management tools, and emerging technologies

- Proven leadership experience managing teams and complex engagements
- Experience in client-facing roles and business development preferred
- Excellent analytical skills and problem-solving abilities
- Proven experience in leadership, team building, and communication skills

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