



Title: **Tax Director – Construction Industry**

Location: Iowa/ Nebraska / Missouri / Kansas

### **JOB SUMMARY**

The Creative Planning Business Services **Tax Director** plays a key leadership role focusing on the Construction and Real Estate Industry, providing strategic leadership and direction with responsibility for quality, client experience, team development, retention, and practice growth. This role requires an experienced and forward-thinking leader with a strong background in the Construction and Real Estate industry to effectively lead and manage complex tax engagements. As a senior leader, this individual serves as a trusted advisor to clients and a key resource to internal teams while delivering technical expertise, proactive tax planning, and consulting services. This individual plays an integral role in mentoring and developing talent, advancing firmwide initiatives aligned with growth, operational excellence, and the firm's cultural values.

### **JOB DUTIES**

#### **QUALITY**

- Serve as a trusted tax advisor to the Construction and Real Estate industry clients, including general contractors, developers, subcontractors, and related industries, delivering strategic, proactive and practical tax guidance, advice, and compliance.
- Ensure the execution of high-quality client engagements for technical accuracy and completeness with reasonable delivery expectations for themselves and team
- Lead initiatives to maintain firm compliance with professional standards, IRS, state regulations, and internal policies
- Demonstrate timeliness and complete knowledge of firm policies on financial matters: billing, accounts receivable, budgets, time reporting, engagement, and profitability and holds the team accountable to these standards
- Enforce compliance with tax quality management processes, including internal inspections and required technical consultations
- Stay current on tax law changes and industry trends impacting clients
- Mentor and train the team on tax law updates, ethical standards, and industry best practices
- Participating in developing internal CPE content

#### **CLIENT EXPERIENCE**

- Serve as the primary contact for a portfolio of key clients, managing communication and expectations
- Strive and support others to build and maintain long-term relationships with every client interaction through proactive advisory and communication
- Effectively manage client relationships and expectations throughout the engagement and beyond to maintain a high level of client retention
- Lead client onboarding, ensuring expectations, scope and communication standards are clearly defined and met

- Operate with a client-first mentality to exceed client expectations and generate referrals
- Anticipate client needs and proactively recommend tax-saving strategies, risk mitigation tactics, and compliance opportunities
- Ensure clients receive timely deliverables and clear insights from tax engagements
- Escalate and resolve client concerns quickly, aligning internal resources as needed
- Collaborate with client accounting, audit, advisory, and other teams to deliver integrated service
- Ability to translate complex tax concepts into actionable client guidance

## PRODUCTION

- Manage a portfolio of complex tax engagements, ensuring deadlines, budgets, and quality standards are met
  - Advise clients on Construction and Real Estate industry-specific tax matters and accounting methods such as:
    - Percentage-of-completion vs. completed contract methods
    - Revenue recognition (IRC §460)
    - Cost capitalization and UNICAP rules
    - Lookback interest calculations
    - Exempt vs non-exempt contracts
    - UNICAP (Section 263A) & capitalization rules
    - Depreciation rules
    - Retainage, change orders & claims
    - WIP schedules and job costing State and local tax considerations, including nexus and apportionment
  - Balance resource planning with seasonal peaks and staff availability to maximize productivity
  - Identify tax-saving opportunities and risk areas for clients, providing proactive recommendations
  - Effectively manage multiple deadlines at once
  - Lead production planning sessions, coordinating with other departments as appropriate
  - Review and approve engagement budgets, work plans, and pricing structures
  - Drive adoption of technologies and processes that improve workflow, review, and collaboration
- Ensure team is leveraging work appropriately to team members based on capacity and skill set within your team and across the firm

## GROWTH & BRAND

- Achieve personal and team growth goals
- Model a growth mindset by providing referrals to other Creative Planning services
- Ensure the team develops and executes a personal brand strategy to identify opportunities within new and existing client relationships
- Generate meaningful revenue for the practice to achieve revenue and growth targets as established
- Represent Creative Planning at community and industry events
- Support strengthening and building center of influence relationships and ask for and make referrals
- Encourage team members to continue to learn and grow in their practice area

- Partner with others to craft thought leadership, white papers, and webinars

## 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 to team members while ensuring other team leaders do the same
- Help team members achieve their goals through training, coaching, and development
- Foster a supportive 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
- 12+ years of Tax experience including a strong focus on Construction and Real Estate industry clients
- 5+ years of direct supervisory experience leading, managing, & developing a team preferred
- 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
- Deep technical knowledge of Construction and Real Estate specific tax regulations and accounting methods
- Strong technical income tax ability, including understanding and application of IRS and State tax codes
- Experience with multi-entity and multi-state organizations
- Proficient in Microsoft Office Suite
- Familiarity with tax software, project management tools, and emerging technologies
- Strong analytical and problem-solving abilities
- Strong leadership, team building, and communication skills

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