Title: **Tax Senior – Credits & Incentives**

Location: Any Location/ Hybrid/ Remote

**JOB SUMMARY**

The **Tax Senior** is responsible for, but not limited to, providing Credits and Incentives identification, preparation, review, and compliance efforts to the Specialty Tax Practice participating in engagement scheduling, project coordination, and identifying opportunities for process improvement. The Tax Senior is focused on continually expanding their knowledge and technical expertise of Credits and Incentives while still assisting other areas of the Specialty Tax Practice as needed.

**JOB DUTIES**

- Conduct in-depth research and analysis of federal, state, and local incentive programs, including tax credits, discretionary incentives, grants, and financing tools
- Review and organize client data to determine eligibility for various programs (e.g., job creation, capital investment, R&D activities, renewable energy, New Markets Tax Credits, 179D, etc.)
- Prepare application materials, client deliverables, project trackers, and incentive compliance documentation
- Participate in client calls and meetings, providing technical support, and helping to manage deadlines and expectations
- Perform diversified assignments, planning, and scheduling of client engagements under the direction of the engagement team.
- Keep current on and apply basic accounting standards and education.
- Effectively follow instructions and meets budgets and deadlines for assigned areas, projects, and overall assignments.
- Understand and adhere to client confidentiality standards; demonstrate awareness of the firm's risk management policies and procedures, by identifying and referring ethical, independence, and conflict issues to the manager and/or partner.
- Actively seek opportunities to join business development meetings with the goal to build strong relationships and drive new client projects and revenue.
- Explore industry specialization and industry-focused service. This may include attending peer group meetings or industry organization involvement.
- Serve as a resource for associates and interns. This may include technical training and providing feedback on client engagements.
- Support the growth and professional development of yourself and your Creative Planning teammates by participating in company-sponsored training, CPE courses, internal committees, and mentorship opportunities.
- Communicate effectively with your team striving for open and honest dialogue in all interactions.

**REQUIRED EXPERIENCE / QUALIFICATIONS**

- Familiarity with incentive programs such as NMTC, job credits, investment tax credits, TIF, etc., preferred
- A bachelor's degree in accounting or a related field of study
- CPA certification preferred
- 2+ years of professional services experience with a record of high achievement a plus

**TECHNICAL SKILLS**

- 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
- Knowledge of technology and tools best practices including tax software
- Quality control
- Risk assessment, analysis, and management
- Measurement analysis and interpretation

Salary Range: $80,000 -95,000