



CREATIVE PLANNING

Title: **Tax Manager – Estate, Gift and Trust (EGT)**

Location: Any Location/Hybrid/Remote

JOB SUMMARY

The **Tax Manager** works with Tax Directors to assist in preparing & reviewing client deliverables. The Manager will be responsible for initial review of tax returns and projections, responses to government inquiries and assisting wealth managers with client questions. The Tax Manager will also have clients assigned to them for which they will be responsible for all client communication and final review of tax returns. In addition, Tax Managers assist with training & development of interns, associates and senior associates. The Manager is responsible for managing their time and workload so that all assignments are completed in a timely manner. We are looking for a self-motivated, personable and task oriented person who can work well with our existing tax group and our clients.

JOB DUTIES

- Review tax returns for a large volume of clients, including Estate, Gift and Trust returns
- Assist Directors with timely & accurate responses to questions, estimates, projections, etc. with both tax and wealth management clients
- Communication of tax returns and projections with clients.
- Stays up to date on tax law changes and is able to communicate the effects of the law changes to clients
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- CPA License
- Experience with Charitable Remainder Trusts (CRTs) and Form 990s
- Minimum 5 years of experience specializing in Estate, Gift, Trust and CRT filings

PREFERRED EXPERIENCE / QUALIFICATIONS

- Master's Degree in income taxation

TECHNICAL SKILLS

- Understanding and previous use of Windows 10 or 11
- Proficiency in MS Excel and Word
- Ability to quickly learn and adapt to new systems and technology
- Previous use of ProSystem Fx or CCH Axcess Tax preferred, but not required

Salary Range: \$90,000 - \$150,000