

Senior Tax Associate

Job Summary:

Creative Planning Tax, LLC is a part of Creative Planning, Inc. and works in conjunction with wealth managers to provide tax consulting and compliance services.

The **Senior Tax Associate** works with Tax Managers & Directors to assist in preparing client deliverables. The Senior Associate will be responsible for initial preparation of all assigned tax returns and projections, responses to government inquiries and assisting wealth managers with client questions. The Senior Associate will also begin initial review of projects completed by associates and interns, as they are ready to do so. In addition, Tax Senior Associates assist with training & development of interns and tax associates. The Senior Associate is responsible for managing their time and workload so that all assignments are completely 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.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly

Job Duties:

- Prepare & review tax returns for a large volume of tax clients, including individuals, trusts, and businesses
- Assist Directors with timely & accurate responses to questions, estimates, projections, etc. with both tax and wealth management 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:

- Undergraduate degree in Accounting
- CPA eligible
- Minimum 1 year experience

Preferred Experience/ Qualifications:

- Master's Degree in income taxation
- Experience with income tax preparation

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

Salary range: \$65,000 - \$90,000

