



## CREATIVE PLANNING

Title: Tax Senior Associate  
Location: Any Location/Hybrid/Remote

### OVERVIEW

BerganKDV recently joined Creative Planning, one of the nation's top independent wealth management and investment advisory firms, also providing a comprehensive suite of consulting, tax and advisory services for business and institutions. This is a unique opportunity to join a top tier firm paving the way for unparalleled client and team member experiences.

### JOB SUMMARY

The Tax Senior 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.

### 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 7 or 8
- Proficiency in MS Excel and Word
- Ability to quickly learn and adapt to new systems and technology

### **EXPLORE THE WORKPLACE OF THE FUTURE**

Together, we are building the nation's preeminent wealth and business advisory practice, by providing a comprehensive suite of services that support and empower individuals, families, institutions and businesses. Our values drive our decisions, and our passion is putting our clients at the center of everything we do.

#### **Creative Planning Differentiators:**

- Day One Benefits Enrollment
- Growth Potential
- Close-Knit Collaborative Team
- Mentor Program
- Employee Referral Rewards
- Comprehensive Benefits Package
- Customized Career Paths
- Open Door Leadership Style
- Firm-wide Trips for All Team Members
- Creative Planning Cares

### **BENEFITS THAT GO BEYOND**

We are proud to offer a competitive and comprehensive benefits package, with options designed to help you make the best decisions for yourself, your family and your career. Our competitive compensation package is catered to reward you for your performance and recognize you for the value you bring to our business. In addition, our total package includes medical and dental coverage, matching 401(k) plans, PTO, observed holidays and a range of programs and benefits designed to support your physical, financial and social well-being.

Creative Planning is an equal opportunity employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

We will ensure that individuals with disabilities are provided reasonable accommodation to participate in the job application or interview process, to perform essential job functions, and to receive other benefits and privileges of employment. Please contact us to request accommodation.