



## CREATIVE PLANNING

Title: Tax Supervisor  
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 Supervisor will provide complex tax preparation, review, and ancillary services to the Creative Planning Business Services tax practice, while participating in activities of the Firm outside of the tax practice.

### JOB DUTIES

- Deliver a full range of tax services in compliance with laws and regulations in a timely manner
- Prepare and review complex tax returns
- Act as a resource for staff and senior accountants, provide feedback and offer guidance and direction
- Supervise projects for some clients
- Build relationships and interact with clients to provide excellent planning, consulting, and expertise
- Provide innovative tax planning and review complex income tax returns
- Identify and mitigate tax risks
- Manage tax provision and tax compliance process
- Improve processes by developing or implementing best practices
- Build in-depth knowledge of key client industries by looking for opportunities, joining industry organizations, and developing a targeted potential client pool
- Enhance existing client relationships and actively seek to develop beneficial new relationships with potential clients and referral sources
- Remain current with federal and state tax law changes
- Communicate with engagement team to relay status of projects
- Manage tax projects and provide feedback to Tax Staff and Seniors
- Assist in firm administrative functions
- Recognize opportunities to provide additional services to existing clients
- Take appropriate responsibility for understanding time budgets on projects, when to communicate challenges to completion within budget expectations, and setting budgets while holding others accountable for meeting budget

### REQUIRED EXPERIENCE / QUALIFICATIONS

- Education: BA or BS in Accounting or related degree
- Experience and/or Training: 5+ years tax experience
- Licenses/Certificates: Driver's license, CPA certification

- Technology/Equipment: Computer skills including Microsoft Office and database management; PC literate in software applications i.e. Word, Excel, Internet, etc. and experience in the operation of office equipment/machines

#### **TECHNICAL SKILLS**

- MS Office /Windows experience particularly financial modelling and data management in Excel
- Strong analytical and problem-solving abilities
- Excellent written and verbal communication skills

#### **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   | • Comprehensive Benefits Package       |
| • Growth Potential              | • Customized Career Paths              |
| • Close-Knit Collaborative Team | • Open Door Leadership Style           |
| • Mentor Program                | • Firm-wide Trips for All Team Members |
| • Employee Referral Rewards     | • 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.