



Senior Tax Associate

Income Tax Department • CPA Firm • Full-Time | Hybrid
Reports To: Tax Manager or Tax Partner

POSITION SUMMARY

The Senior Tax Associate supports the Tax Manager and Partners in delivering forward-looking tax planning and compliance solutions for individuals, businesses, and other entities. This role is central to preparing and reviewing complex federal and state tax returns while providing proactive, client-first communication that reflects our firm's standards of excellence.

The ideal candidate is a licensed CPA or Enrolled Agent (EA) with strong technical expertise, high emotional and social intelligence, and an unwavering commitment to accuracy, efficiency, and genuine client care. Beyond technical skill, we seek someone who leads with ownership, communicates with clarity, and elevates those around them.

WHAT THIS ROLE DOES

Assist the Tax Manager and Tax Partner in developing forward-looking tax strategies for individuals and businesses; managing their tax burden while preparing accurate, compliant federal and state tax returns across all entity types.

YOUR ONE THING

"Wow the client with quick, clear, and concise communication - every time."

This is not a metric. It is a standard. Every email, every call, every deliverable is an opportunity to demonstrate that our clients made the right choice.

CORE RESPONSIBILITIES

- ÷ Prepare and review complex individual, business, and fiduciary (trust/estate) tax returns.
- ÷ Conduct tax research and identify tax-saving opportunities proactively during return preparation.
- ÷ Communicate with clients regarding deliverables, open questions, and next steps in a timely and professional manner.
- ÷ Support and mentor junior associates; review their work for accuracy and provide constructive guidance.
- ÷ Maintain accurate, real-time client records and workflow status in firm platforms (HubSpot, Truss, etc.).
- ÷ Collaborate cross-departmentally to ensure a seamless and consistent client experience.
- ÷ Identify process inefficiencies and contribute to firm initiatives focused on quality and operational excellence.
- ÷ Assist managers and partners with technical, administrative, or consultative tasks as needed.

EXPECTATIONS

Every member of our team is expected to:

- ÷ Live and model our Core Values in every interaction: People First, Wow Every Client, Best Possible Outcome.
- ÷ Clearly understand and operate within the Six Critical Questions of our firm playbook.
- ÷ Remain engaged and proactively communicate concerns across the twelve key practice areas.
- ÷ Lead with an ownership mentality; taking initiative, following through, and holding themselves accountable.
- ÷ Participate in community engagement and service as a representative of the firm.
- ÷ Communicate well: clearly, promptly, and with appropriate context.
- ÷ Be a leader on the team, regardless of title, through action, attitude, and example.

GOALS & OBJECTIVES

Horizon	Objectives
Daily	6+ billable hours/day • Respond to client communications within 24 hrs • Minimize errors and rework • Deliver approved returns within 24 hrs of TM/TP approval • Maintain accurate HubSpot records • Support managers/partners as needed
Short-Term	Increase proficiency in individual and business return prep • Lead client review and Q&A calls • Generate at least one positive online review per month • Proactively identify tax planning opportunities during return preparation
Long-Term	Provide autonomous tax planning and consulting services • Master individual foreign tax return preparation • Lead TOA training and refresher sessions • Identify and develop content for departmental tax trainings

QUALIFICATIONS

- ÷ CPA or EA license in good standing (required).
- ÷ Bachelor's degree in Accounting, Finance, or a related field.
- ÷ 3+ years of experience preparing and reviewing individual and business tax returns.
- ÷ Strong command of federal and state tax codes, regulations, and compliance requirements.
- ÷ Excellent written and verbal communication skills—able to translate complex tax concepts for clients.
- ÷ High emotional and social intelligence: collaborative, self-aware, and effective under pressure.
- ÷ Proficiency with tax preparation and CRM software preferred (e.g., Intuit ProConnect, HubSpot, Truss).



OUR CORE VALUES

People First

We treat every client with respect, clarity, and care, taking responsibility for those who trust us.

Wow Every Client

We deliver a world-class experience through preparation, responsiveness, and disciplined execution, every step, every time.

Best Possible Outcome

We apply deep knowledge and sound judgment to advocate relentlessly in pursuit of the best possible tax outcome under the law.

These values guide every action and decision at our firm. They are not aspirational posters, they are behavioral standards lived daily by every member of our team.

GROWTH & ADVANCEMENT

This role is designed as a development pathway. High performers who demonstrate technical mastery, leadership, and client excellence will be considered for advancement into Tax Manager or Partner-track roles. We invest in people who invest in themselves and in our clients.