FiveStone | TAX ADVISERS

Senior Tax Associate

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

WHO WE ARE

Five Stone Tax Advisers is a faith-based, mission-driven CPA firm built on a simple belief: serve people faithfully, and everything else follows. Our promise to clients is simple too: less tax, more good, delivered by protecting people, relieving their burdens, and pursuing the best possible outcome under the law. We believe excellence honors God, so we hold ourselves to the highest standards of quality, integrity, and disciplined execution in everything we do.

That same spirit shapes how we treat each other. We serve our clients so we can serve our team, building a supportive environment where people are genuinely cared for, not just employed. We want our team members to succeed, in their careers and in their lives, so we encourage learning and growth at every stage, from earning certifications to pursuing advanced degrees.

Generosity is part of who we are: we give freely of our time and resources, including 33% of our annual profits, to bless our community and those in need around the world. Every decision we make, for our clients and for each other, is guided by our core values: People First, Wow Every Client, and Best Possible Outcome.

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	7+ 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 offshore 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).

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OUR CORE VALUES

People First	Wow Every Client	Best Possible Outcome
We treat every client with respect, clarity, and care, taking responsibility for those who trust us.	We deliver a world-class experience through preparation, responsiveness, and disciplined execution, every step, every time.	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.

WHY FIVE STONE

Five Stone Tax Advisers is an exceptional place to grow your career. We pride ourselves on a culture that prioritizes purpose, flexibility, and professional development.

- **Purpose Beyond Profits.** We donate 33% of our annual profits to local and international charities, offer five company-paid volunteer days each year, and lead regular donation drives that support the greater Austin area.
- **Flexibility and Work-Life Balance.** To prevent industry burnout, we offer remote and hybrid work options, flexible scheduling, and a generous PTO policy that lets you rest and unplug.
- **Financial Security and Career Growth.** We invest in our team through competitive salaries, 401(k) matching, and performance bonuses, and we fully fund CPA and EA certifications, continuing education (CPE) credits, and professional membership fees.
- **Holistic Health and Family Care.** Our benefits include comprehensive health, dental, and vision insurance with HSA options, paid parental leave, gym membership reimbursements, and 100% company-paid life and disability insurance.
- **Strong Team of Professionals.** You will work alongside an elite team of more than 30 specialized CPAs and tax attorneys in a collaborative environment where your contributions directly impact the world for the better.