FiveStone | TAX ADVISERS

Tax Manager

Income Tax Department • CPA Firm • Full-Time | Hybrid
Reports To: 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 Tax Manager leads the delivery of forward-looking tax planning and compliance for individuals, businesses, and complex entities, owning engagement quality from intake through final sign-off. This role carries primary responsibility for reviewing accuracy, client relationship management, and the day-to-day performance of the associates and senior associates on the team.

The ideal candidate is a licensed CPA or Enrolled Agent (EA) with deep technical expertise, proven review judgment, and the leadership presence to develop talent and resolve issues before they reach a partner. Beyond technical mastery, we seek someone who builds capability in others, communicates with clarity under pressure, and treats every client relationship as their own.

WHAT THIS ROLE DOES

Lead a team of associates and senior associates in delivering proactive tax strategy and accurate, compliant returns across all entity types; own the review and sign-off process, manage client relationships and engagement economics, and develop the next generation of technical talent.

YOUR ONE THING

"Own the outcome and elevate the team that delivers it - every client, every time."

This is not a metric. It is a standard. A manager's signature means the work is right, the client is cared for, and the people who did it grew in the process.

CORE RESPONSIBILITIES

- Own the final review and sign-off of complex individual, business, and fiduciary (trust/estate) tax returns prepared by the team.
- Manage client relationships across the engagement lifecycle, serving as the primary point of contact for planning, deliverables, and escalations.
- Lead proactive tax planning and research, translating technical positions into clear, actionable client guidance.

- Plan and balance team workload, capacity, and deadlines throughout the year.
- Develop, coach, and evaluate associates and senior associates; deliver timely feedback and direct their technical growth.
- Monitor engagement economics, including budget, realization, and scope, and surface billing or scope concerns early.
- Maintain accurate, real-time client records and workflow status in firm platforms (HubSpot, Truss, etc.).
- Partner with leadership on process improvement, quality control, and firm-wide initiatives.

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.
- Develop the people they lead, creating clarity, accountability, and opportunity for their team.
- 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 ownership mentality, taking initiative, following through, and holding the team accountable.
- Participate in community engagement and service as a representative of the firm.
- Communicate well: clearly, promptly, and with appropriate context.
- Set the standard on the team through action, attitude, and example.

GOALS & OBJECTIVES

Horizon	Objectives
Daily	5+ billable hours/day with the balance in review and team support • Clear the team’s review queue within 24 hrs of submission • Respond to client communications within 24 hrs • Release approved returns same day • Keep HubSpot current
Short-Term	Own a defined book of client relationships • Reduce review rework through coaching and checklists • Lead planning conversations and review calls independently • Drive consistent positive client reviews across the team
Long-Term	Build a self-sufficient, high-performing team • Develop at least one associate toward senior or one senior toward manager • Own a practice niche or specialty • Contribute to firm strategy, training, and process design

QUALIFICATIONS

- CPA or EA license in good standing (required).
- Bachelor’s degree in Accounting, Finance, or related field; Master’s in Taxation is a plus.
- 6+ years of progressive experience preparing and reviewing individual and business tax returns.
- 2+ years of review, supervisory, or team leadership experience.
- Advanced command of federal and state tax codes, regulations, and compliance requirements.
- Demonstrated ability to manage client relationships and resolve complex technical issues independently.

- Excellent written and verbal communication; able to lead difficult conversations with clients and staff.
- High emotional and social intelligence: collaborative, self-aware, and steady under pressure.
- Proficiency with tax preparation and CRM software (e.g., Intuit ProConnect, HubSpot, Truss).

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 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 the proving ground for firm leadership. Managers who consistently deliver technical excellence, develop strong teams, and grow client relationships will be considered for Partner-track advancement. We invest in people who invest in their teams and 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.