



CREATIVE PLANNING

Title: **Tax Manager**
Location: Naples or Fort Meyers, FL

JOB SUMMARY

The Creative Planning Tax Manager plays a key role in supervising tax engagements, ensuring technical excellence, on-time delivery, and strong client service. This position focuses on leading staff and seniors on tax compliance and advisory work, reviewing deliverables, resolving routine technical issues and identifying areas for process improvement while being a leader in the firm's tax department. The Tax Manager collaborates with the Tax Director and Managing Tax Director to ensure the seamless execution of firm goals in quality, client service, operational efficiency, growth, and culture.

JOB DUTIES

- Effectively manage client relationships and expectations throughout the engagement and beyond to maintain a high level of client retention for the Tax Director.
- Stay updated on tax law changes, ethical standards and industry best practices and mentor and train the team.
- Implement the firm's quality control policies in daily work and escalate concerns.
- Ensure firm compliance with professional standards, internal policies and IRS and state regulations.
- Serve as a primary point of contact for routine client questions, coordinate timely responses and keep them informed of progress and deadlines.
- Develop a reputation with clients for reliability, responsiveness, and technical competence.
- Deliver a full range of tax services and effectively manage multiple deadlines.
- Engage in client discussions about strategic tax topics and proactively recommend tax-saving strategies, risk mitigation tactics, and compliance opportunities.
- Collaborate with seniors and staff to lead, assign and supervise work to ensure client deliverables are accurate, timely, and meet expectations.
- Use tax software and tools effectively, and ensure staff compliance with processes.
- Monitor engagement budgets and highlight issues early.
- Demonstrate timeliness and complete knowledge of firm policies on financial matters: billing, accounts receivable, budgets, time reporting, engagement, and profitability.
- Support the growth and professional development of yourself and your teammates by participating in company sponsored trainings, CPE courses, internal committees, mentorship opportunities and collaborative reviews.
- Identify opportunities within new and existing client relationships.
- Model Creative Planning values.
- Provide and ensure open communication with all team members to promote a positive learning environment that focuses on trust, transparency, and accountability.

REQUIRED EXPERIENCE / QUALIFICATIONS

- Active CPA Certification
- 5+ years of Tax experience including a strong track record of working with closely held business entities
- A bachelor's degree in accounting or related degree

TECHNICAL SKILLS

- History of reviewing income tax returns of complexity while meeting quality standards

- Solid technical skills in corporate, partnership and individual tax, including understanding and application of IRS and State tax codes
- Proficient in Microsoft Office Suite
- Familiarity with tax software, project management tools, and emerging technologies
- Excellent written and verbal communication skills
- Integrity, dependability, a positive attitude and a strong work ethic

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