

TAX MANAGER JOB DESCRIPTION

At Fortitude Financial Partners

a Mariner Advisor Network partner firm

Mariner Advisors Network is looking for a Tax Manager in Oakbrook Terrace, IL. This is a full-time opportunity open for a financial advisor company affiliated with Mariner Advisor Network. The Tax Manager will work directly with clients and wealth management teams to review and implement tax strategies for clients as well as prepare tax returns for wealth management clients. The individual selected for this role will be a tax enthusiast, thoughtful listener, have a strong team mentality, and be driven to grow professionally and personally. Entrepreneurial mindset preferred for ideal candidate to manage and grow all aspects of the tax business.

Responsibilities

- Responsible for client relationships and retention; inspiring client confidence through demonstrated expertise; and ensure we are meeting deadlines and addressing client questions and needs on an ongoing basis
- Review tax returns, quarterly and annual income tax projections, estimated tax vouchers extension forms and related work papers and financial statements
- Understand the client's overall business needs and help identify value-added services
- Work with peers and leaders to create and present strategic tax planning solutions to high-net-worth clients and closely held businesses
- Support and guide the research of technical matters for complex tax needs and updates to regulations
- Commitment to continuing education, team development, training and mentoring new tax associates
- Manage and grow tax revenue and professional team

Qualifications

- Bachelor's degree required
- 4+ years' tax experience working in private or public accounting firm or financial planning firm
- CPA or EA preferred

Skills and Knowledge

- Experience providing client-centric tax consulting to high-net-worth clients, partnerships, trusts and closely held entities
- Strong research capabilities related to technical matters for complex tax needs and updates to regulations
- Mastery of various tax compliance software products (CCH or GOSystem preferred)
- Highly effective interpersonal, relationship management and communication skills
- Excellent organizational and time management skills in a high energy culture to manage multiple priorities in a time-sensitive environment
- Experience training new staff and mentoring interns
- Strong attention to detail

