

Tax Manager with Trust and Estate Experience

Who We Are

The culture at SDK is evident the minute you walk in the door. We believe in teamwork and in treating each other with care and respect. This philosophy, in turn, is how we aspire to work with our clients. We have an open-door policy and believe in every member of our team working with clients. It is this nurturing of employees and clients that sets us apart and is clearly stated in the firm's mission; To help our clients and people maximize their business and personal potential.

What to Expect as a Tax Manager at SDK

The Manager is the liaison between the shareholder, the client, and the professional staff. Managers are responsible for managing multiple tax projects and client engagements simultaneously, and scheduling, staffing, and coordinating engagement workflow. Managers develop relationships with clients/business owners.

As a Tax Manager with SDK you can expect the following:

- Being responsible for tax engagements for organizations and for family groups along with working on our most complex returns. This includes reviewing staff & senior work and at times may include preparing complex returns. You will also assist in billing clients.
- Reviewing Trust, Estate and Guardianship fiduciary accounting.
- Reviewing federal and state fiduciary and estate tax returns and projections.
- Ensuring that receipts, disbursements and distributions have been recorded.
- Ensuring that maintenance of accounts and records for estates and trusts are in order.
- Completing or providing supervision of trust and estate administration, including record keeping, monitor filing deadlines and client communication.
- Assist with estate and tax planning for high net worth consulting engagements.
- Work as part of an integrated team to meet deadlines you have in your own practice.
- Communicating recommendations, technical issues, and opportunities to clients and prospects, including meeting with them. You will work with Shareholders and professional staff to ensure that client's needs and SDK standards are met.
- Identifying and understanding tax law developments and the impact on your client's situation. You will conduct research and provide thorough conclusions and supporting documentation, possibly including conducting educational seminars both internally and externally to clients.
- Focusing on efficiency, but not relinquishing quality. You will work with Staff and Seniors on engagements and will demonstrate proper delegation of work to ensure projects are completed on time and within budget. Providing feedback and completing Assignment Project Review for Staff/Seniors.
- Making an impact at SDK by participating fully on our team to provide the best for our clients, our staff and the firm.

You are a good fit for the Tax Manager role if:

- You believe in your own ability to get things done and be successful while maintaining open communication with your team.
- You have strong communication skills, both written and verbal, and can effectively articulate both the big picture and the details.
- You enjoy the challenge of new and changing tax law and determining how it will impact your clients, the firm, and the industry.
- You focus on client service and believe that how you represent yourself represents the firm as a whole.
- You set challenging personal and client service team goals and take action to achieve them.
- You have five to ten years of public accounting experience, at least 5 years' experience with trusts and estates, a Bachelor's degree in Accounting, and are a licensed CPA.
- You can work in the office at least three days a week
- You have a valid driver's license and vehicle for occasional same-day travel for work at client's offices, meetings, and seminars.

Is This You?

If reading through this excites you and you are ready to learn more, let's chat!

If you are ready to apply, please email your resume and salary requirements to thand@sdkcpa.com

You can also learn more about your future career with SDK and by visiting our careers page at sdkcpa.com/careers.

SDK CPAs is an EEO/AA employer. SDK CPA is a hybrid employer requiring at least 3 days of work each week to be completed in the office.