



## **TAX SENIOR JOB DESCRIPTION**

### **JOB SUMMARY:**

The Tax Senior reports to the Tax Manager and/or Tax Partner and is responsible for organizing and managing client engagements and projects including the completion of engagement tasks and project components.

### **RESPONSIBILITIES:**

- Acquires strong working knowledge of client's business.
- Builds strong working relationships with clients to gather information, resolve problems and to sell/cross-sell products or services.
- Effectively documents work, identifies and solves issues and draft client reports.
- Identifies, communicates and solves engagement and technical issues as well as communicating engagement progress in a timely and organized manner.
- Assists in identifying business development opportunities and in developing new business proposals, budgets and fee quotes.
- Assists in preparing billings and in collections.
- Supervises, trains and mentors Tax Associates.
- Works as an effective team member to successfully complete engagements including:
  - Preparing complex tax returns and tax planning calculations.
  - Reviewing less complex individual and business tax returns.
  - Conducting complex research and drafting tax memos.
  - Assisting in drafting responses to IRS and state agency audits, inquiries and tax notices.
  - Assisting with administrative projects such as the annual revision to checklists and engagement letters.

### **SKILLS:**

- Strong project management, organizational skills and attention to detail.
- Strong analytical, technical and research skills.
- Ability to balance multiple priorities and complete assignments within time constraints and deadlines.
- Strong verbal and written communication skills.
- Ability to quickly adapt to changing client and business dynamics with recommended solutions.



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### REQUIRED QUALITIES – The MWA Way:

- Be kind.
- Be dedicated to providing personalized attention and service.
- Be a proactive and strategic solution provider.
- Be a relationship builder.
- Be a collaborative team player.
- Be trustworthy.

### REQUIRED EDUCATION AND EXPERIENCE:

- Bachelor's or Master's degree in Accounting.
- CPA certification and active license (or actively working to obtain certification) preferred.
- 3+ years audit experience in a public accounting firm, with some nonprofit audit experience preferred.
- Proficiency in Microsoft Office software programs, QuickBooks, ProSystem fx Tax, Engagement and GoFileRoom software (or equivalent software).

### ABOUT MWA:

Mann Weitz & Associates is a CPA firm dedicated to meeting the accounting, audit, tax and business advisory needs of privately held companies, professional service firms and high net worth individuals and nonprofit organizations. In fact, we are widely considered one of the premier CPA firms in Chicago for associations, foundations and charitable organizations.

At MWA, we pride ourselves on becoming trusted business advisors to our clients. We do this by providing the expert advice and leading edge solutions you would expect from a larger firm, coupled with an unwavering commitment to providing the prompt and personalized attention only a boutique CPA firm can deliver. We understand that each of our clients is unique and tailor our approach and services accordingly.

### HOW TO APPLY:

Interested candidates should email their resume to [info@mwa.cpa](mailto:info@mwa.cpa) with Tax Senior Job Application in the subject line.