Tax Manager

Would you like to leave the rat race of public accounting and stop tracking your time in 15-minute increments? Would you like to exchange a toxic work environment for a positive company culture? Would you enjoy putting more time into tax planning for the average client, instead of focusing on transactional work? Willis Johnson & Associates (WJA) is currently seeking a tax professional who is excited to continue building the tax preparation division of our firm. As a comprehensive wealth management firm that focuses on executive and professional clientele, tax planning is in the forefront of our work. Whether we are optimizing Roth conversions in low tax years, avoiding incurring Net Investment Income Tax, recommending a Net Unrealized Appreciation (NUA) opportunity, or maximizing retirement contributions by assisting with Solo 401(k)s, we know tax planning is vital to maximizing our client's long-term success.

Company Summary

Who is WJA? We are a fast growing, award-winning, wealth management firm specializing in corporate executives and professionals. We help our clients optimize everything in their personal financial life from compensation and benefit strategy to tax mitigation, from retirement planning to investments and insurance. And with everything we recommend, we put our clients first—all the time, every time. No product sales. No commissions. Straight fee-based financial planning, asset management and outstanding tax preparation! WJA is also proud to be one of the Best Places to Work by Investment News.

Does this sound like the type of team you would want to part of? Our fees are based on assets we manage, not 15-minute increments.

Essential Responsibilities

- Collaborate with existing tax team to implement the continuously-expanding vision of the tax division of our firm.
- Participate in high-level client facing activities targeted to build lasting client relationships.
- Interface with existing tax team to manage tax compliance and year-round tax planning.
- Perform tax projections for clients in close coordination with the Wealth Management Advisors.
- Consult on client cases as the in-house expert for tax projections throughout the year when analyzing stock option strategies, optimizing Roth conversions, and other tax sensitive situations.
- Build models for running different tax scenarios for specific client-related situations.
- Identify and implement procedures to mitigate inefficiencies in the Tax Compliance function.
- Support in-house marketing efforts by writing educational articles that are pertinent to clients and prospective clients.
- Produce 1 – 2 educational webinars per year in collaboration with our in-house Marketing department.
- Attend weekly Wealth Management meetings.
- Expect long hours during tax season with lots of flexibility throughout the rest of the year.

Qualifications

- CPA license required.
- Master's degree in Accountancy preferred. Experience as a tax manager at a reputable CPA firm, required.
- Five or more years of public accounting experience with a focus on individual, trust, and small business returns.
- A wiz with tax preparation and tax projection software.
- Experience in consulting with high-net worth corporate executives, trusts and/or small businesses preferred.
- Strong technical and interpersonal skills.
- Strong written and oral communication skills
- Very detail-oriented with an ability to work on several concurrent projects and tax returns.
- Confident, poised and professional in appearance.
- Ability to take on creative challenges and manage workload on tight deadlines.
- Ability to collaborate and contribute to a team environment.

What We Offer

- Work/Life Balance. For Real
- Collaborative, Positive Teammates
- Advancement Opportunities
- Autonomy in Your Role
- Professional Development Options
- Rewarding Work That Matters

Compensation & Benefits

- Salary range: $110,000 - $160,000/year
  - The salary includes a bonus paid out upon completion of tax season.
- 401(k) plan with opportunity to earn up to 7% the first year and 10% with tenure.
- Best and brightest leaders will have opportunities to buy into and become owners in the firm over time.
- 10 paid holidays and 15 PTO days to use at your discretion.
- Employer paid Health/Dental/Vision insurance premiums for individuals and families.
- Employer HSA contributions
- Employer paid Life and Long-Term Disability

To Apply- Because we are looking for an exceptional candidate to be the next member of our team, multiple team members participate in the interview and selection process. To apply, please email your resume and cover letter to jobs@wjohnsonassociates.com with your full name, followed by "Tax Manager" in the subject line.