CREATIVE PLANNING

Title: Tax Supervisor

Location: Bloomington, Minnesota

Job Description: **JOB SUMMARY**

The **Tax Supervisor** works to provide excellent tax preparation, review and ancillary services in all client engagements including direct client involvement and relationship building. A Tax Supervisor will seek opportunities for growth and mentorship and is an active participant in firm initiatives.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Deliver a full range of specialized tax, compliance and consulting services in compliance with laws, regulations and timelines.
- Keeps current on and applies basic accounting standards and education; identifying and mitigating tax risks.
- Accountability in the workflow for client engagements ensuring quality completion of all work. Providing innovative tax planning, identifying and mitigating tax risks.
- Acts as a resource for staff and senior accountants, providing feedback and offering guidance and direction.
- Understands and adheres to client confidentiality standards; demonstrating awareness of firm's risk management policies and procedures, by identifying and referring ethical, independence and conflict issues to manager and/or partner.
- Build authentic relationships with clients through all interactions. Work to identify areas where Creative Planning can further their business and goals.
- Actively seek opportunities to join business development meetings with the goal to build strong relationships and drive new client projects and revenue.
- Explore industry specialization and industry focused service. This may include attending peer group meetings or industry organization involvement.
- Be a resource for other members of the tax team. This may include technical training and providing feedback on client engagements.
- Support the growth and professional development of yourself and your Creative Planning teammates by participating in firm sponsored trainings, CPE courses, internal committees, and mentorship opportunities.
- Communicate effectively with your team striving for open and honest dialogue in all interactions.

REQUIRED QUALIFICATIONS / EXPERIENCE

- A bachelor's degree in accounting or related field of study or master's degree in taxation
- CPA certification; highly preferred
- 4+ years of professional services experience with a record of high achievement a plus
- Excellent interpersonal skills
- Strong written and verbal communication skills
- Strong analytical, teamwork and organizational skills
- Integrity, maturity, dependability, a positive attitude and a strong work ethic
- PC proficiency, including spreadsheet, word processing and presentation software applications
- Analytical skills with high detail orientation
- Research and understand professional frameworks, standards and guidance
- Technology and tools best practices including tax software
- Quality control
- Risk assessment, analysis and management
- Measurement analysis and interpretation
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- Explore industry specialization and industry focused service. This may include attending peer group meetings or industry organization involvement.
- Be a resource for other members of the tax team. This may include technical training and providing feedback on client engagements.
- Support the growth and professional development of yourself and your Creative Planning teammates by participating in company sponsored trainings, CPE courses, internal committees, and mentorship opportunities.
- Communicate effectively with your team striving for open and honest dialogue in all interactions.

Salary Range: $100,000 - 120,000

Creative Planning, LLC is an independent wealth management firm, whose affiliates also provide business consulting, tax, financial, and other professional services to clients. Creative Planning and its affiliates lease employees and other resources to BerganKDV, an independent, separately governed, and licensed CPA firm, in support of audit and attest services BerganKDV provides to its clients.