CREATIVE PLANNING

Title: **Tax Senior**

Location: Omaha, NE

JOB SUMMARY

The **Tax Senior** is responsible for items including but not limited to providing excellent tax preparation, review, and ancillary services to the tax practice participating in engagement scheduling, and identifying areas of process improvement. The Tax Senior is focused on increasing technical skills while beginning to explore opportunities to assist the firm outside of the tax practice.

JOB DUTIES

- Perform diversified tax assignments, planning, and scheduling of client engagements under the direction of the engagement team.
- Keep current on and apply basic accounting standards and education.
- Effectively follow instructions and meets time budgets and deadlines for assigned areas, projects, and overall assignments.
- Understand and adhere to client confidentiality standards; demonstrate awareness of the firm's risk management policies and procedures, by identifying and referring ethical, independence, and conflict issues to the manager and/or partner.
- 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.
- Serve as a resource for tax associates and interns. 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 training, CPE courses, internal committees, and mentorship opportunities.
- Communicate effectively with your team striving for open and honest dialogue in all interactions.

REQUIRED EXPERIENCE / QUALIFICATIONS

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- A bachelor's degree in accounting or a related field of study
- CPA certification preferred
- 2+ 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
- Knowledge of technology and tools best practices including tax software
- Quality control
- Risk assessment, analysis, and management
- Measurement analysis and interpretation

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