



SENIOR TAX CONSULTANT / SUPERVISING TAX SENIOR ESTATE + TRUST SERVICES

Job Posting

Position Summary:

Senior/Supervising Senior is a tax professional responsible for developing client relationship and preparing tax returns for Trust and Estate clients.

Starting Salary Range:

\$63,750 – \$78,500 (depending on if experiences is at the Senior or Supervising Senior level)

Education Required:

- Bachelor's degree in Finance or related field
- CPA Preferred
- Minimum 2+ years of trust/estate experience in public accounting or trust office role

Duties + Responsibilities:

Senior:

- Develop client relationships and serve as a trusted advisor.
- Participate in client meetings to assist with answering questions, review returns, research tax issues, and be involved in strategic tax planning.
- Review workpapers and tax returns prepared by tax consultants and other department professionals including technically complex returns.
- Lead, coach and develop tax consultants.
- Knowledge and some experience preparing 709 gift tax returns
 - Understanding of gift and Generation Skipping Transfer (GST) tax rules
- Knowledge and some experience preparing 1041 estate and trust tax returns
 - Electing Small Business Trust (ESBT) Returns
 - Trust accounting concepts
 - Understanding of Distributable Net Income and its relationship to income taxation
- Knowledge and some experience preparing 706 estate tax returns
 - Experience with reading Wills
 - Experience with Trust Agreements
 - Knowledge of various 706 schedules and requirements

Supervising Senior:

- Duties as list above plus:
- Prepare and review 709 gift tax returns
 - Understanding of gift and Generation Skipping Transfer (GST) tax rules



- Prepare and review complex 1041 estate and trust tax returns
 - Electing Small Business Trust (ESBT) Returns
 - Trust accounting concepts
 - Understanding of Distributable Net Income and its relationship to income taxation
- Prepare and review 706 estate tax returns
 - Experience with reading Wills
 - Experience with Trust Agreements
 - Knowledge of various 706 schedules and requirements

Technologies:

- Proficient with Microsoft Excel, Word, Outlook and Adobe Reader/Pro

Competencies:

- Ability to maintain a high level of accuracy and confidentiality
- Excellent written communication skills including strong spelling and grammar
- Excellent verbal and interpersonal communication skills and present a professional image
- Must be organized and can set priorities and meet deadlines while working independently

Work Environment:

Primary work location is an office environment with considerable time spent at a desk viewing a computer monitor. Workspace is relatively free from unpleasant environmental conditions, noise or hazards.

Physical Demands:

Primarily sedentary, lifting up to 10 pounds regularly. Continuously requires vision, hearing, talking, and keyboarding. Frequently requires multi-tasking, working closely with team members, fine dexterity for repetitive, detail-oriented work. Occasionally requires time pressures, frequent changes of tasks, moving between workspaces or meeting rooms, carrying, reaching, and bending or crouching.

Disclaimer:

The above is intended to describe the general content of the requirements for the performance of this job. It is not to be constructed as an exhaustive statement of essential functions, responsibilities or requirements.

How to apply:

If this sounds like the opportunity you have been searching for, we would love the opportunity to connect.

Learn more about SKR+CO at skrco.com.