WILLIS JOHNSON & ASSOCIATES
STRATEGIC WEALTH MANAGERS

Tax Manager

Tired of keeping track of your hours? 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 build out and lead the tax preparation division of our firm. As a comprehensive wealth management firm that focuses on executive and professional clientele, tax planning is quite often 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.

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 soon… tax preparation!

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

- Build out the tax division of our firm.
- Determine which tax preparation software we will use, work with the wealth management department to determine how to best collect data from clients, and what deliverables we will provide.
- Serve as the point person for preparing income tax returns.
- Responsible for performing tax projections for clients in coordination with the wealth management department.
- 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.
- Supports firm Marketing efforts by writing articles that are pertinent to clients and prospective clients.
- Attend weekly Wealth Management meetings and bi-monthly Leadership Team meetings.
- Expect long hours during tax season with lots of flexibility through the rest of the year.

Qualifications

- CPA license required, PFS/CFP 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 consulting with high-net worth corporate executives, trusts and/or small businesses preferred.
- Master's degree in Accountancy preferred.
- Strong technical and interpersonal skills.
- 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.

To Apply- Because we are looking for an exceptional candidate to be the next member of our team, our entire advisory staff participates in the 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.