Job opportunity: Senior Tax Specialist

Company Profile:

- Robust Alternatives was launched to assist the business owner obtain a better understanding of business finances. We serve entrepreneurial businesses from pre-revenue to about $10mm.
- We are an accounting and business advisory service firm, focusing on accounting, entity level taxation and the interplay on individual taxation of entrepreneurial business owners.
- We design and improve tracking systems and dashboards for both operational & financial measures, train and develop client's internal accounting personnel as well as supplement higher level skills on a fractional basis in the roles of Controller & Chief Financial Officer.
- Our tax practice is focused on proactive tax planning more than simple preparation.

Job Details:

- Title – Tax specialist, corporate, partnership & related individuals
- Status – Full time
- Renumeration – Salary, exempt & bonuses
- Benefits – 401k & paid time off
- Location – Medway MA & client sites within region (some, limited remote available)

Job Description:

- At Robust Alternatives, the Senior Tax Specialist is a challenging and fulfilling position. This person supports our clients with more than just standard tax compliance work. This entails ensuring the underlying accounting systems are effectively supporting accurate preparation of tax returns. More importantly, these systems should be aimed toward managing the continued success of the entity. We don't simply "punch out tax returns" but rather we tie out a client's records and seek to improve systems, toward simplifying the accounting process and making it more understandable and useful.

Duties, responsibilities & essential functions:

- Responsible for:
  - Preparation of underlying records and workpapers used to support a tax return.
  - Tying out client's trial balance with supporting documentation
  - Proving payroll to payroll tax records
  - Creating loan amortization schedules from source documents
  - Suggesting journal entries &/or change to client's recordkeeping as well as getting clients agreement & understanding for changes
- Ability to work with various forms of client recordkeeping including, QuickBooks backups, QuickBooks online, spreadsheets and occasionally, hand-written information. Our clients tend to be more sophisticated (i.e., not handing over a shoebox of receipts).
- Creating clear and logical documentation which allows reviewing supervisor to follow the reasoning of the workpapers and then communicate changes to clients is required.

146 Main Street, Medway, MA 02053 • p: 508-243-1684 • f: 508-553-9789
JimR@RobustAlternatives.com • www.robustalternatives.com

Required Education, Experience & Competencies:

- Bachelor’s degree in finance or accounting required
- Tax experience required, ideally 3+ years
- Workpaper preparation experience
- CPA or CPA candidate preferred
- U.S. work authorization required
- Computer literacy is required, specifically:
  - Tax preparation software, currently Drake Software (training available)
  - Proficient in Microsoft office suite (Word, Outlook, Excel)
  - Excel, extensive experience required
  - QuickBooks and other bookkeeping software
  - Adobe Acrobat and distilling (preferable)
  - Scanning and File Manager, especially logical file layout (preferable)

This job description in no way states or implies that these are the only duties to be performed by this employee. The employee will be required to follow any other instructions and to perform any other duties requested by supervisor.