Senior Tax Associate+ (preferably Manager or Partner)
Department: Income Tax / CPA Firm
Reports To: Tax Manager or Partner
Employment Type: Full-Time | Hybrid

Position Summary
The Senior Tax Associate supports the Tax Manager and Partners in delivering forward-looking tax planning and compliance solutions for individuals, businesses, and other entities. This role focuses on preparing and reviewing complex federal and state tax returns while providing proactive communication and high-quality client service.

The ideal candidate is a licensed CPA or Enrolled Agent (EA) with strong technical expertise, exceptional communication skills, and a commitment to accuracy, efficiency, and client care.

Core Purpose
To help clients achieve financial peace of mind by providing clear, accurate, and compliant tax solutions that minimize their tax liability and align with long-term goals.

Your "One Thing"
Wow the client with quick, clear, and concise communication — every time.

Core Responsibilities

- Prepare and review complex individual, business, and fiduciary tax returns.
- Conduct tax research and planning to identify savings opportunities.
- Communicate proactively with clients regarding deliverables, questions, and next steps.
- Support and mentor junior team members and review their work for accuracy.
- Maintain accurate client records and workflow updates in firm software (HubSpot, Truss, etc.).
- Collaborate cross-departmentally to ensure a seamless client experience.
- Identify process improvements and support firm initiatives related to efficiency and quality.

Daily & Short-Term Expectations

- Produce an average of 6+ billable hours per day.
- Respond to all client communications within 24 hours (excluding weekends/holidays).
- Deliver approved tax returns to clients within 24 hours of manager approval.
- Minimize rework through high attention to detail and proactive review.
- Participate in department meetings and contribute to best practice sharing.
- Receive at least one positive client review per month (e.g., Google, Yelp, or NPS).

Long-Term Objectives

- Expand expertise in comprehensive tax planning and consultation.
- Develop leadership and client advisory skills, including managing high-value client relationships.
- Mentor junior associates and assist in their professional growth.
- Contribute to firm growth through client retention, referrals, and process innovation.
- Demonstrate readiness for advancement into Tax Manager or Partner track roles.

Qualifications

- Required: CPA or EA license in good standing.
- Bachelor’s degree in Accounting, Finance, or related field.
- 3+ years of experience preparing and reviewing individual and business tax returns.
- Strong understanding of federal and state tax codes and regulations.
- Excellent communication, analytical, and organizational skills.
- Experience with tax preparation and CRM software preferred (e.g., Intuit ProConnect, HubSpot, Truss).

Core Values

Effectiveness • Professionalism • Selflessness • Commitment • Growth

These values guide every action and decision at Five Stone — they are not just what we do, but who we are.