FIVE STONE Tax Advisers

PROTECT | PRESERVE | PREPARE

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

Position Summary
The Tax Associate supports the Income Tax department in delivering accurate, compliant, and forward-looking tax solutions for individuals, businesses, and other entities. This role focuses on preparing and assisting with the review of federal and state tax returns, maintaining organized client files, and ensuring excellent communication throughout the client relationship.

The ideal candidate is a CPA or currently pursuing CPA licensure, with a strong understanding of tax fundamentals, excellent communication skills, and a commitment to accuracy, efficiency, and professional growth.

Core Purpose
To deliver accurate, timely, and thoughtful tax solutions that help clients achieve financial peace of mind and long-term success.

Your "One Thing"
Wow the client with accuracy, timeliness, and proactive communication — every time.

Core Responsibilities

- Prepare individual, business, and fiduciary tax returns under supervision of a Senior Associate or Manager.
- Assist in tax research and planning to identify opportunities for client savings.
- Communicate proactively with clients regarding document needs, deadlines, and next steps.
- Maintain accurate client records and task tracking in firm software (HubSpot, Truss, etc.).
- Collaborate with team members to ensure a seamless and efficient client experience.
- Support quality control by reviewing and organizing documentation prior to manager review.
- Participate in departmental process improvement initiatives and ongoing training.

Daily & Short-Term Expectations

- Produce an average of 6 billable hours per day.
- Respond to client communications within 24 business hours (excluding weekends/holidays).
- Maintain clean, organized, and current client records.
- Demonstrate strong attention to detail to minimize rework.
- Meet department productivity goals while maintaining quality and accuracy standards.

Long-Term Objectives

- Expand technical tax knowledge and develop proficiency in advanced tax planning concepts.
- Strengthen client communication and advisory skills.
- Progress toward CPA licensure and advanced responsibilities within the firm.
- Contribute to team collaboration, process efficiency, and firm growth.

Qualifications

- Preferred: CPA license or currently pursuing CPA.
- Minimum: 2 years of experience preparing individual and/or business tax returns.
- Bachelor’s degree in Accounting, Finance, or related field required.
- Strong understanding of basic federal and state tax codes and filing requirements.
- Excellent written and verbal communication skills.
- Proficiency in Microsoft Office 365 and tax preparation software (e.g., Intuit ProConnect, HubSpot, Truss).
- Detail-oriented, organized, and able to manage multiple priorities effectively.

Core Values

Effectiveness • Professionalism • Selflessness • Commitment • Growth

These values guide every interaction and decision at Five Stone. They are not just what we do — they define who we are.