FINANCIAL FOUNDATIONS

Complicated Made Simple®

Job Title:
Tax Manager

Position Type:
Full-Time

Work Location:
1 Research Drive, Suite 100B
Westborough, MA 01581

Company Overview:

Financial Foundations is an independent financial planning, wealth management, and consulting firm. We live by our motto: Complicated Made Simple®. We take this mantra seriously and strive to simplify our clients' lives by providing a variety of comprehensive services and tools. Financial Foundations values its relationship with Commonwealth Financial Network®, our premier broker/dealer.

Job Overview:

Financial Foundations is seeking a highly motivated, detail oriented, and knowledgeable Tax Manager. This Tax Manager will lead and manage tax engagements for over 300 clients covering twenty-one states including individual, trust, estate, non-profit, and small businesses. This role will operate within a full-service taxation department under Financial Foundations, Inc., contributing to the process for tax season, properly responding to tax notices, conducting tax projections, and researching tax law. Outside tax season, this role is responsible for preparing proper tax projections and ensuring clients make estimated tax payments.

This is an ideal opportunity to move away from the dynamics and pressures that tend to exist in a large firm environment. Working mainly within the tax service department, this person will also assist where needed in our operations department.

A positive, people-first personality is a must at Financial Foundations, as we are already a fun, friendly, and welcoming group. Strong interpersonal skills and an ability to establish and maintain good client relationships are paramount. If you are interested in joining a progressive and growing firm and have a desire for the leadership opportunity that comes with a smaller firm, we would love to talk with you!

Primary Responsibilities and Duties:

- Comply with all FINRA/SEC/Commonwealth Financial Network compliance regulations.
- Ensure complete client satisfaction through open communication, managing deadlines, and proactively sharing tax strategies.
- Maintain strong interpersonal skills and the ability to quickly adapt to evolving client and team needs.
- Work closely with Chief Operating Officer on day-to-day operations.
- Assist with client service requests, help prepare materials for client meetings, and maintain organized client files.
- Monitor and provide support for ongoing projects.
- Assist with client mailings.
- Help develop and improve processes for active business tasks.

Requirements/Qualifications:

- Licensed Tax Practitioner (CPA or EA designation).
- Bachelor's degree, preferably in Business, with an advanced degree or designation as a major advantage.
- Five or more years of relevant work experience is **mandatory.**
- Excellent knowledge and communication of tax preparation and planning.
- No registered complaints.
- Positive attitude and exemplary customer service skills.
- Exceptional attention to detail.
- Preferred experience with MS Office Suite (Outlook, Word, and Excel)
- Proficiency in relevant computer systems (i.e. QuickBooks, ProSeries, etc.)
- Pursuant to the firm's COVID-19 mitigation protocols, individuals must be fully vaccinated upon commencing employment.

Benefits:

- Salary commensurate with experience.
- We offer a very competitive benefit package, including medical, dental, life insurance, 401(k) match, etc. Team members also receive generous paid time off and personal days, as well as a flexible work schedule and an opportunity for a year-end bonus.