

Tax Accountant Job Description

Team Objective

WCG Inc. is a mid-size tax and accounting firm with 7 partners, about 42 employees and \$7.2M in revenue located in Colorado Springs, Colorado and Mitchell, South Dakota. We primarily engage with small business owners (S Corps, Partnerships, PCs) and complex individual tax preparation. We take a consultative approach to our client engagements by offering routine consultation and a strong focus on planning and business advisory services. Tax return quality and efficiency naturally occurs from routine client interaction throughout the year.

Charge hours? Not us. Tracking time to the 6-minute increment? No way. While WCG has hourly rates for open-ended projects and other craziness, the Tax team operates with a value pricing approach offering fixed fee ranges for our services including tax return preparation.

Our approach to tax and accounting engagements is very unique. We were one of the first CPA firms to offer Business Advisory Service plans with a fixed value-based fee structure including our newly added Tax Patrol services.

The Tax team uses Thompson Reuters UltraTax and is self-hosted by our own cloud-based servers. We will prepare about 4,500 tax returns for the 2023 tax return year, with a nice split of 60% individual and 40% business entity tax returns.

Basics

- ▲ Must have at least 2 years tax experience (business consulting a plus) working in a public accounting firm environment.
- ▲ Must be on a CPA track or willing to obtain EA credential within 180 days of start date (we have reimbursement programs).
- ▲ \$66,000 to \$90,000 total compensation. Bonuses, if offered, are considered in addition to total compensation.
- ▲ Bonuses, based on billables and efficiency (including qualitative intangibles). Bonuses, if offered, are considered in addition to total compensation.

Locations

- ▲ 2393 Flying Horse Club Drive, Colorado Springs, CO 80921
- ▲ 300 North Main Street, Mitchell, SD 57301
- ▲ Remote location as a new hire is available, but will be experience dependent.

Tax Accountant Duties

You will be working directly with the Tax team including Tax Managers and Supervisors, and other WCG Managers. Your duties include-

- ▲ Guiding WCG along the path of success,
- ▲ Promoting WCG culture, and encouraging excellence and high team morale,
- ▲ Developing and implementing WCG goals, procedures, and policies in coordination with other Partners, Directors, Managers, Supervisors and Associates,
- ▲ Identifying overall improvement gaps and assisting with deploying corrective measures,
- ▲ Providing feedback, concerns, and recommendations to WCG leadership to continuously evolve Tax into a better service line,
- ▲ Assisting with development of internal policies relating to taxation and implementation of policies into existing practices,
- ▲ Assisting in leadership of the Tax team and its processes which includes tax planning, tax return preparation, business consultation, and other closely related functions,
- ▲ Preparing tax returns and tax plans, and tracking down missing information,
- ▲ Calculating salary recommendations and tax plans,
- ▲ Resolving tax notices and other issues,
- ▲ Answering client correspondence promptly and within the Firm's guidelines for client communications,
- ▲ Coordinating client-centric efforts with other teams,
- ▲ Helping to keep the workflow moving, and
- ▲ Other tasks related to accounting, taxes, and consultation.

The following duties will be added based on skillset and WCG needs-

- ▲ Reviewing salary and tax projections with clients,
- ▲ Researching complex or unusual tax questions, and drafting memos and conclusions, and
- ▲ Promoting new ideas and business solutions to existing clients and prospective clients,

Supplemental Job Descriptions

WCG has certain cross-over or hybrid positions between the tax team and other teams. Generally, a commitment of at least one year is required in a hybrid position. Rather, these are designed to increase exposure to other WCG activities and improve overall skills.

Certain time commitments and certain goals are adjusted for those fulfilling a hybrid position.

Onboarding Specialists

The Tax Accountant - Onboarding Specialist performs the general duties of a Tax Accountant. However, up to 50% of their time is devoted to the Business Development team with an emphasis on onboarding new clients. Onboarding new clients focuses on salary recommendations, tax plans, answering client questions, processing initial payrolls among other onboarding tasks.

Other Requirements

All salaried positions must work 2,000 hours annually / 12-month trailing period. See attached projected hour table by week as an example. Holidays and other office closures count towards the 2,000 hours (e.g., Thanksgiving would contribute 8 hours towards the 2,000-hour requirement). PTO and other employee-requested leaves do not count towards the 2,000-hour requirement. Please refer to the WCG Employee Handbook for additional information.

Career Path

The career path for Tax includes Supervisor, Manager, Senior Manager and Partner.

Tax team members can easily transition to accounting services or payroll processing. Many people simply enjoy preparing tax returns while others want to explore other options. WCG does not limit any employee who wants to grow and develop, and eventually find their career path.

How to Apply

Please visit our website for current openings, company-paid benefits, a description of who we are and the “how do I get this cool gig?” series of steps-

wcginc.com/jobs