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## *Position:*

**Manager – Tax (Salary commensurate with experience, plus discretionary bonus)  
San Antonio Location**

## *Company Profile:*

**Southern Wealth Management, LLP** is an investment advisory firm serving high net worth families and individuals. We were established in 2005 and are headquartered in San Antonio, Texas with additional offices located in Dallas, Texas, Midland, Texas and New Orleans, Louisiana.

## *Job Description:*

Our company is looking for a qualified **Tax Manager** able to service our high net worth clients complex tax needs. This individual will serve as a tax advisor while providing innovative tax compliance, planning and consulting services. The candidate **must be a professional who understands the responsibility of dealing with sensitive and confidential data.** The candidate will need to possess highly complex problem-solving skills and attention to detail. This position will report to Tax Principals and Partners.

## *Education, Certifications and Experience:*

- A minimum of a Bachelors' degree in Accounting, preferably a Masters' degree in Accounting or Taxation.
- Active CPA License
- 5+ years' proven work experience as a Tax professional including 2+ years' experience reviewing complex federal and state tax returns for individuals, partnerships, trusts and corporations for a public accounting or CPA firm.
- Experience in Ranch and Oil & Gas accounting a plus.
- Knowledgeable in the use of GoFileRoom, GoSystems, FirmFlow, Lacerte and QuickBooks a plus.
- Proficient using the Microsoft Office suite particularly Excel, Outlook, and Word.
- Ability to work extensively with databases, spreadsheets, financial/legal documents, and files.

## *Job Responsibilities:*

- Provide innovative tax planning and review complex tax returns.



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- Oversee client tax compliance, planning and consulting projects.

### ***Job Responsibilities (Cont.):***

- Exceptional client service along with the ability to build strong client relationships.
- Provide thought leadership to the tax team while actively developing and mentoring other members of the tax group.
- Recommend tax strategies by researching federal and state taxation.
- Maintain and manage client lists so client's expectations and due dates are met.
- Develop tax strategies and policies that help the client maintain compliance with local and federal tax laws and regulations.
- Work to identify tax problems and propose solutions.

### ***Must have Attributes/Attitude/Aptitude:***

- Self-starter that desires to take initiative.
- Acceptance of our core values: Clients first, Ownership, Result oriented, Accurate, Teamwork, and Hustle & Humility.
- Ability to work well on a team or autonomously.
- Excellent interpersonal skills.
- Strong verbal and written communication skills.
- Ability to organize, prioritize, and manage multiple tasks within set deadlines

### ***Physical Requirements:***

- Must be able to lift 25 lbs.
- Must be able to sit or stand for 8 – 10 hours.

**I have read and understand the duties, responsibilities and qualifications of this position and acknowledge that I can perform the essential functions of the job with or without an accommodation. I also understand that this is a summary of this positions duties and other responsibilities may be assigned as the company deems necessary.**

*Southern Wealth Management, LLP is committed to hiring and retaining a talented diverse workforce. We are proud to be an Equal Opportunity / Affirmative Action Employer, making decisions without regard to race, gender, gender identity or expression, sexual orientations, national origins, disability status, age, marital status or protected veteran class.*