

Tax Supervisor 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 be an active CPA or EA with 3-5 years tax experience (business consulting a plus) working in a public accounting firm environment.
- ▲ Must have at least a Bachelor's degree
- ▲ \$94,000 to \$120,000 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.

Tax Supervisor Duties

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

- ▲ Guiding WCG along the path of success,
- ▲ Promoting WCG culture, and encouraging excellence and high team morale,
- ▲ Providing feedback, concerns and recommendations to WCG leadership to continuously evolve tax return preparation into a better service line,
- ▲ Supervise certain tax preparation team members (direct reports) and its processes which includes tax return preparation, tax planning, tax consultation, and other closely related functions,
- ▲ Monitoring and assisting the Tax onboarding process for all new clients and ensuring a positive client experience,
- ▲ Calculating salary and tax projections, and entering shareholder payroll, and reviewing salary and tax projections with clients,
- ▲ Preparing tax returns (70%) and reviewing tax returns (30%) for Tax Accountants, Tax Managers and Partners,
- ▲ Delivering and reviewing tax returns with clients, and representing WCG and the public accounting community with integrity,
- ▲ Resolving tax notices and other issues,
- ▲ Researching complex or unusual tax questions, and drafting memos and conclusions,
- ▲ Promoting new ideas and business solutions to existing clients and prospective clients,
- ▲ Answering client phone calls and emails,
- ▲ Filing and organizing electronic documents,
- ▲ Training and leading fellow employees,
- ▲ Helping to keep the workflow moving, and
- ▲ Doing other tasks related to accounting, taxes, and consultation.

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.

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