

Tax Professional (Senior or Manager Level)

We are a boutique tax and advisory firm serving high-income individuals, successful business owners, and their businesses across the United States. Our clients value thoughtful guidance, proactive planning, and clear communication.

We take a white-glove approach to service and pride ourselves on doing excellent work for excellent clients. We are a **technology-forward firm**, using modern tools and systems to work efficiently and deliver a high-quality client experience. Our culture is grounded in shared values; many members of our team and client base come from faith-centered backgrounds, shaping our emphasis on integrity, stewardship, and long-term relationships.

This position is a blended role that includes direct client interaction, advisory support, and some tax preparation. The ideal person is technically strong, client-facing, and **proactive**; someone who anticipates needs, identifies planning opportunities, and takes ownership of client relationships.

Key Responsibilities

- Prepare and review complex individual and business tax returns
- Support tax planning and advisory services for individuals and business owners
- Participate in client meetings (video and in person), explaining tax issues in a relatable manner
- Communicate with clients via email, phone, and video
- Proactively identify issues and opportunities and follow through on solutions
- Collaborate with a small team and mentor others as needed

Qualifications

- Public accounting experience with complex individual and business returns
- Comfortable leading client discussions
- Strong technical tax foundation or desire to deepen expertise
- Experience with Lacerte and/or ProConnect, QuickBooks Online, Google Workspace, and Microsoft Office (or willingness to learn)
- CPA or EA preferred, not required

Why Join Us

- Interesting, complex tax work with high-quality clients
- Predictable hours and respect for life outside of work
- Collaborative, technology-forward environment
- Competitive compensation and full benefits
- On-site role based in **Bel Air, MD**

