Whittier Trust

INVESTMENT & WEALTH MANAGEMENT

JOB DESCRIPTION
Tax Associate

POSITION SUMMARY

The Tax Associate reports to the Tax Manager and works closely with the other Tax Associates in the department. The position is responsible for the preparation and review of tax returns, including ensuring all federal and state income tax returns are prepared timely and accurately and in compliance with applicable laws. The position is also responsible for 1099 year-end tax information reporting.

PRIMARY RESPONSIBILITIES

- Tax return preparation: Prepare corporate, fiduciary (complex, grantor, simple and split-interest), gift, individual, partnership and private foundation tax returns, including preparation of work papers and lead sheets; preparation of tax projections and related estimated payments; analyze client information and offer recommendations for reducing client tax liabilities; perform tax research.
- Assist in preparation of our clients' 1099 (1099-B, INT and DIV) year-end tax information reporting, including reviewing, recommending, and making adjustments to client year-end tax reports.
- General accounting for client business' to be used in preparing income tax returns, including preparation of trial balances and related adjusting journal entries; preparing deposits and disbursement requests.
- Stay current on latest tax law changes. Take advantage of continuing education opportunities.

- Assist with general administrative functions of the Tax Department.
- Assist with other Corporate accounting projects as needed.
- Special projects, as necessary.

COMPETENCIES REQUIRED

- Minimum 2+ years' experience in tax preparation.
- Excellent knowledge of federal and state tax laws and regulations.
- Strong knowledge of Excel, Word and Quick Books.
- Strong written and verbal communication skills. Must be able to communicate clearly and concisely with senior management, client administration, portfolio managers and high-net-worth clients.
- Strong reconciliation and analysis skills.
- Must be a team player and be willing to work over-time (including weekends) when necessary.

PERSONAL CHARACTERISTICS

- Strong client service focus. Responsive to needs of colleagues and clients.
- Ability to prioritize and multi-task.
- Meticulous attention to detail. Must be thorough and accurate.
- High integrity with a strong work ethic.

EDUCATIONAL REQUIREMENTS

- Bachelors' degree required.
- Master's degree in taxation preferred.
- CPA not required but it would be expected that they are working towards this goal.