Title: Tax Professional
Location: Atlanta, GA or Covington, LA
Work Arrangement: Hybrid or Remote

Position Overview:
The firm is seeking an experienced Tax Professional who holds an Enrolled Agent (EA) or Certified Public Accountant (CPA) credential to support individual and business tax preparation, tax planning, and client service.

The firm provides tax solutions and, when appropriate, partners with each client's Wealth Advisor to deliver coordinated, comprehensive service. This role is ideal for a technically strong, detail-oriented professional who is comfortable working independently and taking ownership of deadlines, documentation, and client follow-through.

The successful candidate will be an active listener who asks thoughtful questions, communicates clearly, and takes pride in providing accurate, responsive, and professional client service.

Main Responsibilities:
- Prepare and review individual and business tax returns for Tax Services clients.
- Independently manage assigned tax deadlines, filing calendars, client requests, documentation, and follow-up.
- Conduct client tax planning discussions and gather information through thoughtful, active listening.
- Communicate clearly with clients and, when appropriate, their Wealth Advisor regarding tax matters, outstanding items, timelines, and tax planning considerations.
- Identify tax considerations relevant to individuals, business owners, entities, and individual client circumstances.
- Maintain accurate records, workpapers, client files, and documentation in accordance with IRS and state requirements.
- Provide a high level of client service through responsiveness, professionalism, accuracy, and attention to detail.
- Coordinate with outside professionals and internal team members as needed while maintaining ownership of assigned work.

Preferred Qualifications:
- Enrolled Agent (EA) or Certified Public Accountant (CPA) credential required.
- Experience preparing individual and small business tax returns.
- Strong working knowledge of individual taxation, S corporations, partnerships, Schedule C businesses, and multi-state filings.
- Ability to work independently, manage deadlines, and complete work accurately without close oversight.
- Strong attention to detail and a commitment to producing complete, accurate, and well-documented work.

- Excellent communication skills and experience working directly with clients in a professional services environment.
- Strong active listening skills, with the ability to ask thoughtful questions, understand client circumstances, and explain tax matters clearly.
- Strong organization, time management, follow-through, and ownership of assigned responsibilities.
- Comfortable coordinating with a client's Wealth Advisor and other professionals while maintaining a clear focus on tax services.
- Familiarity with Drake Tax software is required. Experience with accounting systems, Microsoft 365, and related technology tools is also helpful.

Compensation & Benefits

- Competitive base compensation based on experience, credential, qualifications, and role alignment.
- Performance-based bonus opportunity tied to accuracy, timeliness, client service, and overall contribution.
- Medical, dental, and vision insurance.
- Life and disability insurance.
- 401(k) with company match, subject to plan eligibility requirements.
- Unlimited PTO and firm benefits according to company policy.
- Opportunity for professional growth within a client-focused tax services organization that collaborates with Wealth Advisors to support comprehensive client service.

Why Consider This Opportunity?

- Support clients through high-quality tax solutions that coordinate with their broader advisory relationships when appropriate.
- Work in a collaborative environment with Wealth Advisors and other team members focused on delivering a coordinated client experience.
- Join a stable, relationship-based tax services environment that values accuracy, responsiveness, and thoughtful client service.
- Take on a hands-on role that offers meaningful client interaction and the opportunity to take ownership of assigned responsibilities.

Please contact Shari Cown at shari@scconsultingsvcs.com