



Tax Advisor

Job Type: Full-time, exempt

Berger Financial Group is seeking an experienced Tax Advisor to join our tax team. The Tax Advisor is responsible for preparing complete and accurate Federal and State tax returns while delivering high quality client service. In the off-season, you will work with the tax team to support both clients and financial advisors in providing detailed tax planning and reporting in compliance with IRS and state requirements.

Why work here?

- Competitive Pay
- 100% Employee Owned (ESOP)
- 401(k)
- Flexible Working Options
- 12 Paid Holidays & 15 Days of PTO to start
- Company Paid STD, LTD & Life Insurance
- FREE Financial Planning & Tax Preparation Services
- Continuing Education Funding

Work Schedule:

- Monday - Friday
- Scottsdale, AZ office

Responsibilities:

- Preparation of individual, trust, and small business income tax returns (partnerships and S corporations), including necessary accounting, preparing and processing estimates and extensions
- Help manage and develop tax policy
- Participate in income tax research and planning
- Track workflow using internal systems (SalesForce)
- Work with Financial Advisors to produce required reports and tax planning recommendations upon request
- Additional research projects as needed

Required Skills:

- CPA or EA
- Bachelor's Degree or equivalent experience
- Have one (1) or more years of experience in tax or accounting
- Have one (1) or more years of experience working with tax software
- Self-starting person who can work well independently, but still be a team player
- Ability to meet deadlines and effectively handle stressful situations; and to juggle multiple projects
- Exceptional client service, professionalism, and communication skills with a demonstrated ability to develop and maintain client relationships
- Have the ability to manage confidential financial data in a professional manner
- Knowledge and application of accounting and financial software including Microsoft Office, CRM Client Database (Salesforce), Ultra Tax and other tax programs

Meet BFG:

Initially founded as a tax practice in 1981, BFG has broadened its services to include:

- Financial & Retirement Planning
- Portfolio Development & Management
- Income Tax Planning & Preparation

Headquartered in Plymouth, MN, BFG & has expanded to 7 other locations throughout the U.S. including, 3 in Minnesota, 2 in Arizona, 1 in Vermont and 1 in Maine. BFG remains the premier firm in this industry.

Submit resume to HR@bergerfinancialgroup.com