



Tax Advisor

Job Type: Full-time

Berger Financial Group is seeking a professional, goal-oriented, 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.

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
- Work with Financial Advisors to produce required reports and tax planning recommendations upon request
- Additional research projects as needed

Required Skills:

- CPA or EA (preferred)
- Experience with tax software is required (1 or more years of experience preferred)
- Have One (1) or more years' experience in tax or accounting
- 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
- Knowledge and application of accounting and financial software including Microsoft Office, CRM Client Database (Salesforce), Ultra Tax and other tax programs
- 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

Preferred Skills:

- Undergraduate degree or equivalent experience
- Financial industry experience

Benefits:

- 401(k) and Roth 401(k)
- Employee Stock Ownership Plan (ESOP)
- Dental insurance
- Short-term Disability insurance
- Long-term Disability insurance
- Flexible schedule
- Flexible spending account
- Health insurance
- Life insurance
- Paid time off
- Professional development assistance
- Retirement plan
- Vision insurance

Schedule:

- Monday to Friday

Education:

- Bachelor's

Experience:

- Accounting or Tax: 1 year or more (Preferred)
- Tax Software: 1 year or more (Preferred)

Work Location:

- Two locations (Scottsdale, AZ; Sun City West, AZ)

Submit resume and cover letter to info@bergerfinancial.com