ACADIA

POSITION DESCRIPTION

Position Title: Manager – Individual Tax	Department/Location: Tax – Onsite – Baltimore, MD
Reports to: Tax Director	**FLSA Designation/Rate Type:** Exempt/Salaried

POSITION SUMMARY:

The Manager will focus on tax and return compliance and planning for high-net worth individuals and family offices that often have many complex investment structures, with an interplay with philanthropic planning as well as trust and estate planning. This individual may manage direct reports, including all the standard duties that come with management of a team, as well as developing and maintaining the day-to-day of client relationships. The Manager may begin to think "outside the box" to handle sophisticated complexities as they may arise with the families. Communication skills and proactive thinking are crucial in this role.

Key Outcomes:

- Lead, Manage, and Hold Accountable
- Team Performance
- Client Care and Satisfaction
- On Time Delivery

ESSENTIAL DUTIES & RESPONSIBILITIES

- Embodies Acadia's core values and is a standard bearer in all dealings with clients and employees across the organization.
- Facilitate weekly one on ones to ensure team accountability and annual metrics are achieved
- Set realistic deadlines and ensure deadlines are completed on time and with accuracy.
- Review individual, trust and private foundation tax returns and advise on complex transactions for the firm's tax clients including but not limited to:
  - Families that invest in private equity, real estate, venture capital, and hedge funds
  - Families that own interests in management companies and GPs of hedge fund managers
- Assist with and/or lead tax research and consulting projects, as needed
- Be a key member of the team in developing staff in understanding family office structures from a tax perspective, taxes related to trust and estate planning, and planning for families in areas noted above
- Collaborate effectively with staff, seniors and managers to support the firm's thoughtful and proactive approach to tax advisory services
- Successfully manage and deepen client relationships and independently execute and deliver against client and internal deadlines
- Given the dynamic needs of our clients, other interesting and challenging assignments may arise that are outside the typical scope of tax compliance but fully aligned to the Firm's mission to serve our clients' needs.
- Oversees and manages a team of direct reports, to include but not limited to performance conversations, goal setting, time entry and approvals.
- Deploys business acumen to successfully execute and deliver on company strategy and metrics.

- Implements daily business operations and ensure team/direct reports understanding of same.
- Leads a team to meet and exceed goals and objectives, as well as execute on both departmental and individual scorecard metrics.
- Ensure behavior and performance supports the company's V/TO™ and operating principles.
- Perform other duties as assigned.

REQUIREMENTS & QUALIFICATIONS

Education:

- Bachelor's degree required in Finance or Accounting

Skills & Abilities:

- Family office experience strongly desired
- CPA or CPA candidate preferred
- Proven desire and ability to think outside the box to develop potential client solutions, increase efficiencies, and employ new technologies
- Has a continuous improvement mentality and work ethic that is focused on driving real metrics and results
- Comfortable with managing many clients and projects while performing at a high level and meeting stringent deadlines
- Self-motivated and able to work independently
- High attention to detail
- Proficiency in Excel and accounting software packages
- Exceptional organizational skills
- Extraordinary interpersonal/client-facing skills

Experience:

- At least five (5) years of experience in a similar, accounting-focused role

Vision/Traction Organizer™ (V/TO™)

Core Values – The Acadia Way

Our values are the things that we believe are important in the way we operate and work. These values determine our priorities and are a measure to ensure that our ways of working align:

WE ARE EXCELLENT	We set high service standards in all that we do to support our clients and each other.
TRUST IS EVERYTHING	We partner with our clients, their advisors, and each other by committing to a self-giving, high-touch approach that is reliable and individualized.
PREPARED & PROACTIVE	We look forward with care and thoughtfulness, anticipating the needs of our

	clients and our Acadia team.
WE DO WHAT IS RIGHT	We say what we do and do what we say… every time!
WE ARE EAGER TO LEARN & GROW	We seek personal and professional growth and seek continuous improvement in order to remain standard bearers in our industry.

Core Focus™
Purpose: We exist to be Ultimate Client Advocates with impeccable service, superior capabilities, and meaningful connections.

Niche: We are a multi-family office servicing ultra-high net worth individuals that have multiple, sophisticated, alternative investments; and/or trust and estate complexities.