# POSITION DESCRIPTION

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

## POSITION SUMMARY:

As a Senior Tax Accountant one will focus on tax compliance and planning for high-net-worth individuals and family offices. Often, clients have many complex investment structures, with an interplay with philanthropic planning as well as trust and estate planning. This role is supported by the Tax staff to help facilitate excellent execution, communication, and timeliness.

Working closely with senior management and external stakeholders, you will ensure accuracy in financial reporting, compliance with regulatory standards, and provide strategic financial insights to support decision-making. This role may handle more elevated concerns or technically challenging matters.

Key Outcomes:

- Client Care
- First review of Work Product
- 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.
- Prepare and review individual, trust and private foundation tax returns and support 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 tax research and consulting projects, as needed
- Update status of tax return preparation in the Tax Task Trackers daily
- Ensure all deadlines are followed and completed on time
- Be a key member of the team in understanding family office structures, trust and estate planning, and planning for families in areas noted above
- Collaborate effectively across the team to support the firm's thoughtful and proactive approach to tax advisory services
- Execute work with minimal oversight 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.
- Assist with ad hoc internal accounting, HR functions, and tax projects as needed
- Ensure behavior and performance supports the company's Vision/Traction Organizer (V/TO™)
- Solicits feedback; takes action to continuously improve the success of team
- Perform other duties as assigned

ACADIA | FAMILY OFFICE

# POSITION DESCRIPTION

## REQUIREMENTS & QUALIFICATIONS

**Education:**
- Bachelor's degree required in Finance or Accounting

**Skills & Abilities:**
- MS Excel experience required
- Strong written, verbal and mathematical skills
- Ability to operate in a team environment and with external clients
- Position requires a person with the ability to multitask in a fast-paced environment with stringent deadlines
- Strong project management skills and ability to handle multiple clients
- Appreciation for a high level of client service to meet competing client needs
- Self-motivated and ability to work independently
- Strong attention to detail

**Experience:**
- At least two to four years of experience in a similar 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.