

<b>Position Title:</b> Staff Accountant	<b>Department/Location:</b> Tax – Onsite – Baltimore, MD
<b>Reports to:</b> Manager, Tax	<b>FLSA Designation/Rate Type:</b> Exempt/Salaried

**POSITION SUMMARY:**

At Acadia, the Staff Accountant 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. The Staff Accountant play a crucial role in ensuring accurate and timely tax compliance and reporting for our high-net-worth clients. Working closely with senior tax professionals and directly with clients, you will be responsible for preparing individual tax returns and related schedules, while providing exceptional client service and maintaining the highest standards of accuracy.

**ESSENTIAL DUTIES & RESPONSIBILITIES**

- Embodies Acadia’s core values and is a standard bearer in all dealings with clients and employees across the organization.
- Prepare 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
- Update status of tax return preparation in the Tax Task Trackers daily
- Ensure all deadlines are followed and completed on time
- Assist with tax research and consulting projects, as needed
- 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 success of team
- Perform other duties as assigned

**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

**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:

<b>WE ARE EXCELLENT</b>	We set high service standards in all that we do to support our clients and each other.
<b>TRUST IS EVERYTHING</b>	We partner with our clients, their advisors, and each other by committing to a self-giving, high-touch approach that is reliable and individualized.
<b>PREPARED &amp; PROACTIVE</b>	We look forward with care and thoughtfulness, anticipating the needs of our clients and our Acadia team.
<b>WE DO WHAT IS RIGHT</b>	We say what we do and do what we say... every time!
<b>WE ARE EAGER TO LEARN &amp; GROW</b>	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.

**EEO**

Acadia Family Office is proud to be an Equal Employment Opportunity employer. We prohibit discrimination and or/harassment of any type, including but not limited to discrimination and or harassment based upon race, religion, religious creed, color, national origin, ancestry, citizenship, sex, sexual orientation, gender, gender identity, gender expression, age, pregnancy or relation medical conditions, childbirth, breastfeeding, parental status, veteran and/or military statue, disability (physical or mental) medical condition, genetic information or characteristics, political affiliation, domestic violence survivor status, marital status, or other characteristics prohibited by federal, state, or local law. By signing below, you acknowledge that you have received a copy of your position description and minimum requirements for your position with the Company.

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**PRINT NAME** **SIGNATURE** **DATE**