



## Associate Case Manager II

### Job Description

Primary duties of an Associate Case Manager II include performing a variety of tax and financial tasks. Associate Case Manager II responsibilities include analyzing and reviewing financial statements and documents, preparing reports and accurately completing required IRS forms and applications. You will run analysis reports in software programs to evaluate client suitability to determine appropriate resolution options.

In addition to performing the above duties, you will prepare and analyze tax returns.

A successful Associate Case Manager II should have the ability to think critically and have a flair for numbers.

### Responsibilities

- Accurately input financial data in software.
- Review, research and analyze financial information.
- Perform case management by gathering and reviewing documents and providing regular communication updates with firm clients.
- Communicate directly with IRS personnel to collect tax information and request documents.
- Thoroughly understand tax resolution options, requirements and procedures.
- Research IRM and US Tax Code relevant to client's case to report to management.
- Inform management and compile reports/summaries on all assigned cases.
- Assist with research and reviewing case documents and providing support for unassigned cases.
- Perform weekly marketing activities including email, text, and cold calls.
- Function in accordance with established standards, procedures and applicable laws.
- Constantly update job knowledge.

## Skills

- Ability to conduct comparative financial analysis
  - Competency in MS Office, databases and software applications
  - Ability to analyze spreadsheets and financial reports
  - Accuracy and attention to detail
  - Aptitude for numbers
  - Ability to perform filing and record keeping tasks
  - Data entry and word processing skills
  - Well organized
- Personal Use of Office Equipment and Resources will not be allowed without prior permission. The use of games and other leisure activities including reading personal interest literature either through books, computer, personal electronic devices, such as telephone, laptop, tablets etc. will not be tolerated under any circumstances. Use of office resources and personal interest materials will result in disciplinary action. Continued violations may result in termination without prior written notice.

This job description including job requirements may be modified at any time, given notice within **15 days** of expected change in requirements.