

Fitzgerald's 2020 Survey Tax Planning and Tax Compliance Positions

EXAMPLE ONLY





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Introduction

This statistical report presents the results from the 2020 Tax Planning and Tax Compliance Positions Survey, which focuses on cash compensation pay levels.

2020	
Participants in the survey	42
Number of employees submitted	1,920
Number of jobs surveyed	36
Effective Date of Salaries	4/1/2020

Following the completion of the data collection and analysis, data cleaning tests validated the appropriateness of received responses. When necessary, participants have been contacted by FCCS consultants to review position matches, discuss related data concerns, and respond to survey questions.

To assure provision of meaningful pay data, the data screening process includes measuring reported data for variability of the data point range (from the highest and lowest data points within the distribution) to the mean. Data reflects a normal distribution of the data points falling within + or - 2 Standard Deviations.

Data presented in this survey report, on average, reflects a normal pattern of pay distribution to the mean on both a national and (where sufficient data is available to present pay values) on a local basis.

To assure pay data is kept confidential and no individual company's pay data can be determined from reported data:

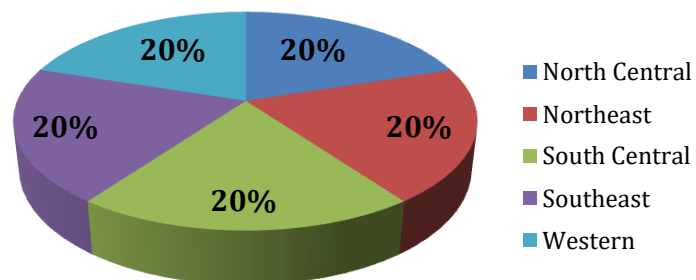
- A minimum of five organizations, reporting pay information for five or more employees, must be available for each job.
- &
- A minimum of five organizations must be reporting pay data for at least one job within market sector for a market sector to be reported.

Survey Participants

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Practices Information

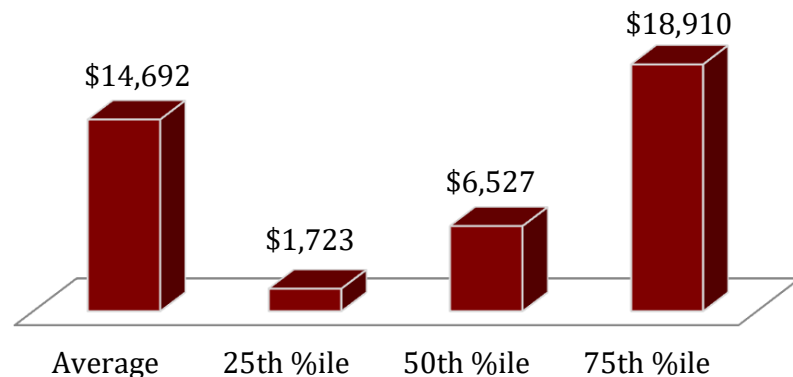
Participant Head Office Location Demographic



The chart to the left displays the head office location of the companies participating.

The average annual gross revenue of all companies surveyed is \$14,692 (million)

Total Annual Revenue



Practices Information

Below displays the percent of participants that belong to each market displayed.

Market Sector Code	Market Sector	Percent of Participants
AFS	Accommodation and Food Services	
AWR	Administrative and Support and Waste Management	
AFF	Agriculture, Forestry, Fishing and Hunting	
AER	Arts, Entertainment, and Recreations	
CON	Contraction	
EDS	Educational Services	
FIN	Finance and Insurance	
HCA	Health Care and Social Assistance	
INF	Information	
MCE	Management of Companies and Enterprises	
MAN	Manufacturing	
MQO	Mining, Quarrying and Oil and Gas Extraction	
PST	Professional, Scientific, and Technical Services	
PAD	Public Administration	
REL	Real Estate, Rental and Leasing	
RET	Retail Trade	
TEL	Telecommunications	
TAW	Transportation and Warehousing	
UTI	Utilities	
WTR	Wholesale Trade	
OSV	Other Services	

Geographic Regions

North Central:

Idaho, Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Montana, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin, Wyoming

Northeast:

Connecticut, Delaware, Maine, Maryland, Massachusetts, New Jersey, New Hampshire, New York, Pennsylvania, Rhode Island, Vermont

South Central:

Arizona, Arkansas, Colorado, Louisiana, New Mexico, Oklahoma, Texas, Utah

Southeast:

Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, Puerto Rico, South Carolina, Tennessee, Virginia, Washington DC, West Virginia

Western:

Alaska, California, Hawaii, Nevada, Oregon, Washington

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Positions Surveyed

Job Code	Job Title	Job Code	Job Title
Global Tax Planning and Compliance Positions		International Tax Planning Positions	
105	Senior Tax Executive: Head of Global Planning and Compliance	605	Tax Director: International Planning
110	Tax Director: Global Planning and Compliance	610	Tax Manager: International Planning
115	Tax Manager: Global Planning and Compliance	International Tax Compliance Positions	
Domestic Tax Planning and Compliance Positions		705	Tax Director: International Compliance
205	Tax Executive: Domestic Planning and Compliance	710	Tax Manager: International Compliance
210	Tax Director: Domestic Planning and Compliance	715	Senior Tax Specialist: International Compliance
215	Tax Manager: Domestic Planning and Compliance	720	Tax Specialist: International Compliance
Domestic Tax Planning Positions		Sales/Use/Property Tax Positions	
305	Tax Executive: Domestic Planning	805	Tax Executive: Sales/Use/Property Planning and Compliance
310	Tax Director: Domestic Planning	810	Tax Director: Sales/Use/Property Planning and Compliance
315	Tax Manager: Domestic Planning	815	Tax Manager: Sales/Use/Property Planning and Compliance
		820	Senior Tax Specialist: Sales/Use/Property Planning and Compliance
		825	Tax Specialist: Sales/Use/Property Planning and Compliance

Positions Surveyed

Job Code	Job Title	Job Code	Job Title
Domestic Tax Compliance Positions		Tax Technology Positions	
405	Tax Executive: Domestic Compliance	905	Tax Technology Director
410	Tax Director: Domestic Compliance	910	Tax Technology Manager
415	Tax Manager: Domestic Compliance	915	Tax Technology Senior Analyst
420	Senior Tax Specialist: Domestic Compliance	Tax Legal Positions	
425	Tax Specialist: Domestic Compliance	1005	Tax Counsel - Senior Manager
International Tax Planning and Compliance Positions		1010	Tax Counsel - Manager
505	Tax Executive: International Planning and Compliance	1015	Tax Attorney - Senior
510	Tax Director: International Planning and Compliance	1020	Tax Attorney - Principal
515	Tax Manager: Internal Planning and Compliance		



Summary Data

Summary Data - Average of Base Salary & Total Cash Compensation

Survey Job Code	Survey Job Title	# of Co's	# of Incumb's	Average Base Salary	Total Cash Compensation Average
105	Senior Tax Executive: Head of Global Planning and Compliance	23	162	\$37,495	\$37,495
110	Tax Director: Global Planning and Compliance	23	152	\$34,065	\$34,065
115	Tax Manager: Global Planning and Compliance	17	609	\$36,557	\$36,557
205	Tax Executive: Domestic Planning and Compliance	18	587	\$38,806	\$38,806
210	Tax Director: Domestic Planning and Compliance	20	335	\$41,022	\$41,022
215	Tax Manager: Domestic Planning and Compliance	29	1354	\$48,686	\$48,686
305	Tax Executive: Domestic Planning	23	1032	\$63,377	\$63,377
310	Tax Director: Domestic Planning	20	349	\$66,237	\$66,237
315	Tax Manager: Domestic Planning	19	182	\$80,101	\$80,101
405	Tax Executive: Domestic Compliance	4	3	-	-
410	Tax Director: Domestic Compliance	19	1157	\$50,965	\$50,965
415	Tax Manager: Domestic Compliance	14	1010	\$61,022	\$61,022
420	Senior Tax Specialist: Domestic Compliance	5	14	\$59,414	\$59,414
425	Tax Specialist: Domestic Compliance	5	162	\$61,825	\$61,825
505	Tax Executive: International Planning and Compliance	13	199	\$31,893	\$31,893
510	Tax Director: International Planning and Compliance	10	146	\$43,805	\$43,805
515	Tax Manager: Internal Planning and Compliance	11	276	\$34,383	\$34,383
605	Tax Director: International Planning	18	4032	\$34,939	\$34,939
610	Tax Manager: International Planning	20	2228	\$43,773	\$43,773
705	Tax Director: International Compliance	15	1045	\$46,435	\$46,435
710	Tax Manager: International Compliance	15	6744	\$36,123	\$36,123
715	Senior Tax Specialist: International Compliance	18	6235	\$42,121	\$42,121



Summary Data

Summary Data - Average of Base Salary & Total Cash Compensation

Survey Job Code	Survey Job Title	# of Co's	# of Incumb's	Average Base Salary	Total Cash Compensation Average
720	Tax Specialist: International Compliance	11	778	\$51,496	\$51,496
805	Tax Executive: Sales/Use/Property Planning and Compliance	14	971	\$42,958	\$42,958
810	Tax Director: Sales/Use/Property Planning and Compliance	13	3345	\$47,511	\$47,511
815	Tax Manager: Sales/Use/Property Planning and Compliance	13	3826	\$58,969	\$58,969
820	Senior Tax Specialist: Sales/Use/Property Planning and Compliance	9	515	\$74,672	\$74,672
825	Tax Specialist: Sales/Use/Property Planning and Compliance	17	2594	\$50,377	\$50,377
905	Tax Technology Director	24	9866	\$58,233	\$58,233
910	Tax Technology Manager	25	7644	\$71,279	\$71,279
915	Tax Technology Senior Analyst	22	4630	\$82,909	\$82,909
1005	Tax Counsel - Senior Manager	10	553	\$39,327	\$39,327
1010	Tax Counsel - Manager	16	285	\$44,341	\$44,341
1015	Tax Attorney - Senior	14	109	\$49,577	\$49,577
1020	Tax Attorney - Principal	10	104	\$68,961	\$68,961

2020 Survey of Tax Planning and Tax Compliance Positions

Survey Job 210 - Tax Director: Domestic Planning and Compliance	Domestic Tax Plan & Compliance
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Primary responsibilities involve participating in the development of domestic tax planning strategies and policies, and directing domestic tax research, analysis, compliance and audit activities.

Market Results

Company Count:			15	Incumbent Count:			124	Law Degree:			15%							
<u>Base Salary</u>									<u>Total Cash</u>									
10th Pctl	25th Pctl	Inc Wtd Avg	Co Wtd Avg	50th Pctl	75th Pctl	90th Pctl	Std Dev	Coeff of Var	10th Pctl	25th Pctl	Inc Wtd Avg	Co Wtd Avg	50th Pctl	75th Pctl	90th Pctl	Std Dev	Coeff of Var	
132,186	149,287	166,300	175,370	166,250	185,400	200,850	30,185	18%	152,154	175,059	205,891	219,844	193,761	242,173	270,276	54,910	27%	
<u>Bonus Amt</u>									<u>Bonus Target Pct</u>									
10th Pctl	25th Pctl	Inc Wtd Avg	Co Wtd Avg	50th Pctl	75th Pctl	90th Pctl	Std Dev	Coeff of Var	10th Pctl	25th Pctl	Inc Wtd Avg	Co Wtd Avg	50th Pctl	75th Pctl	90th Pctl	Std Dev	Coeff of Var	
13,409	26,200	45,229	46,221	37,425	52,600	89,404	31,756	70%	10.0%	20.0%	21.3%	21.9%	20.0%	30.0%	30.0%	7.1%	33%	

<u>Salary Range Structure Summary</u>				<u>Bonus Summary</u>				<u>LTI Summary - Incumbent Weighted</u>			
Incumbent Wtd Average Minimum				Percent Incumbents Bonus Eligible				LTI Target Pct			
				124,145				100.0%			
Incumbent Wtd Average Midpoint				Percent Incumbents Receiving Bonus				Wtd Avg 13.9%			
				157,152				P25th 10.0%			
Incumbent Wtd Average Maximum				Inc Wtd Avg Base Those Not Receiving				P50th 15.0%			
				190,151				P75th 15.0%			
Percent of Companies with Salary Ranges				Inc Wtd Avg Base Those Receiving				Pct Incumbents LTI Elig			
				73.3%				29.0%			
Percent of Incumbents with Salary Ranges				Inc Wtd Avg Bonus as Percent of Base				Wtd Avg Base Those Not LTI Elig			
				79.8%				157,823			
				Percent Incumbents With Target Bonus Percent				Wtd Avg Base Those LTI Elig			
				75.0%				175,055			

	Co / Incumb Count	Annual Base Salary				Annual Bonus / Incentive				Total Cash Compensation				Target Bonus %		
		25th Pctl	Inc Wtd Avg	50th Pctl	75th Pctl	% Inc Eligible	% Inc Paid	Inc Wtd Avg	50th Pctl	25th Pctl	Inc Wtd Avg	50th Pctl	75th Pctl	% Inc W/Trgt	Inc Wtd Avg %	50th Pctl

Market Sector Results

Financial	2 / 5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Healthcare	4 / 9	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Real Estate	9 / 71	149,239	170,669	164,276	190,132	100%	83%	40,320	35,204	175,637	206,077	187,496	224,998	68%	20.7%	20.0%
Utilities	6 / 16	121,581	148,247	158,611	175,587	100%	56%	34,278	27,500	121,581	169,100	182,794	202,972	50%	21.5%	20.0%

Regional Results

Northeast	9 / 29	166,000	182,149	180,000	200,635	100%	90%	63,771	47,500	201,366	239,324	237,234	256,971	52%	24.6%	23.5%
Southeast	7 / 18	149,191	162,622	157,518	176,470	100%	89%	42,590	37,097	181,777	203,309	189,424	233,560	89%	21.9%	20.0%
North Central	10 / 45	144,105	156,431	155,388	169,200	100%	100%	31,761	28,971	167,295	189,899	182,651	221,934	100%	19.2%	20.0%
South Central	6 / 12	140,990	155,098	161,963	170,802	100%	67%	37,766	33,887	158,348	182,400	187,145	214,722	58%	21.0%	20.0%
Western	6 / 19	167,631	175,162	178,720	189,625	100%	47%	70,411	93,310	168,942	208,803	194,750	257,680	47%	25.1%	30.0%



Survey Job Codes and Descriptions

Global Tax Planning and Compliance Positions

105 - Senior Tax Executive: Head of Global Planning and Compliance

Primary responsibilities involve developing global tax planning strategies and policies, and overseeing domestic and international tax research, analysis, compliance and audit activities.

Responsibilities may include: maintaining and expanding current knowledge of emerging domestic and international tax issues and developments; participating in professional and industry groups organized to influence tax legislation and regulation; providing leadership and direction for all company tax planning and compliance activities; overseeing the tax review and assessment of proposed mergers, acquisitions, dispositions and restructurings; providing tax advice, feedback and solutions to senior corporate and operating business executives; selecting and overseeing the work of outside legal and tax advisors and maintaining relationships with them; overseeing the preparation, review and approval of consolidated and business entity tax returns, estimates and provisions; overseeing company tax audit response, negotiation and resolution; and ensuring that internal controls are in place to meet the requirements of SOX 404 as it relates to tax processes and procedures.

110 - Tax Director: Global Planning and Compliance

Primary responsibilities involve participating in the development of global tax planning strategies and policies, and directing domestic and international tax research, analysis, compliance and audit activities.

Responsibilities may include: maintaining and expanding current knowledge of emerging domestic and international tax issues and developments; directing company tax planning and compliance activities; directing the tax review and assessment of proposed mergers, acquisitions, dispositions and restructurings; providing tax advice, feedback and solutions to corporate and operating business executives; participating in the selection and overseeing the work of outside legal and tax advisors and maintaining relationships with them; directing the preparation, review and approval of consolidated and business entity tax returns, estimates and provisions; directing company tax audit response, negotiation and resolution; and ensuring that internal controls are in place to meet the requirements of SOX 404 as it relates to tax processes and procedures.



Survey Job Codes and Descriptions

115 - Tax Manager: Global Planning and Compliance

Primary responsibilities involve implementing global tax strategies and plans, and global income tax compliance, ensuring the timely and accurate preparation and review of tax returns, schedules, extensions and payment estimates to meet the company's global tax calendars.

Responsibilities may include: maintaining and expanding current knowledge of emerging domestic and international tax issues and developments; identifying global income tax opportunities to reduce the effective tax rate and increase cash flows; actively managing and providing guidance in the preparation, review and filing of federal/state/local tax returns, estimates and extensions; managing the preparation of consolidated federal and combined state income tax returns; preparing and reviewing quarterly and year-end close reporting; researching and reviewing the tax implications of proposed domestic and international transactions and restructurings, and presenting recommendations; supporting the negotiation of deal documents and tax indemnity agreements; actively managing and providing guidance in the preparation, review and submission of U.S. filing requirements related to income from international operations; monitoring and supporting local tax compliance of non-U.S. business entities; supporting the work of external legal and other advisors; participating in tax audit preparation, response, negotiation and resolution; providing ongoing tax information, feedback and advice to corporate and operating business executives and managers; identifying tax issues to be researched and/or referred to senior tax management; managing tax process improvement projects; managing technical research of tax compliance issues; and maintaining SOX 404 documentation.

Domestic Tax Planning and Compliance Positions

205 - Tax Executive: Domestic Planning and Compliance

Primary responsibilities involve providing senior tax counsel in the development of short- and long-term domestic tax strategies and plans, developing domestic tax compliance policies and approaches, and overseeing domestic tax compliance activities.

Responsibilities may include: maintaining and expanding current knowledge of emerging domestic tax issues and developments; providing leadership and direction in the development of domestic tax strategies and plans; leading and providing tax review and modeling of proposed domestic mergers, acquisitions, dispositions, partnerships and joint ventures; participating in the selection of external legal and other advisors for domestic tax issues and transactions, reviewing their opinions and maintaining relationships with them; providing advice, feedback and solutions on domestic tax issues to senior corporate and operating business executives; providing leadership and direction for U.S. federal tax compliance for income earned from domestic business operations; overseeing domestic aspects of tax audit preparation, response, negotiation and resolution; and ensuring that internal controls are in place to meet the requirements of SOX 404 as it relates to tax processes and procedures.

Survey Job Codes and Descriptions

210 - Tax Director: Domestic Planning and Compliance

Primary responsibilities involve participating in the development of domestic tax planning strategies and policies, and directing domestic tax research, analysis, compliance and audit activities.

Responsibilities may include: maintaining and expanding current knowledge of emerging tax issues and developments; directing domestic tax planning and compliance activities; directing the tax review and assessment of proposed domestic mergers, acquisitions, dispositions and restructurings; providing tax advice, feedback and solutions to corporate and operating business executives; participating in the selection and overseeing the work of outside legal and tax advisors and maintaining relationships with them; directing the preparation, review and approval of consolidated and business entity tax returns, estimates and provisions; directing domestic tax audit response, negotiation and resolution; and ensuring that internal controls are in place to meet the requirements of SOX 404 as it relates to tax processes and procedures.

215 - Tax Manager: Domestic Planning and Compliance

Primary responsibilities involve implementing domestic tax strategies and plans, and federal/state/local income tax compliance, ensuring the timely and accurate preparation and review of tax returns, schedules, extensions and payment estimates to meet the company's tax calendar.

Responsibilities may include: maintaining and expanding current knowledge of emerging tax issues and developments; identifying federal/state/local income tax opportunities to reduce the effective tax rate and increase cash flows; actively managing and providing guidance in the preparation, review and filing of federal/state/local tax returns, estimates and extensions; managing the preparation of consolidated federal and combined state income tax returns; preparing and reviewing quarterly and year-end close reporting; researching, and reviewing proposed transactions and restructurings; supporting the negotiation of deal documents and tax indemnity agreements; supporting the work of external legal and other advisors; participating in tax audit preparation, response, negotiation and resolution; providing ongoing tax information, feedback and advice to corporate and operating business executives and managers; identifying tax issues to be researched and/or referred to senior tax management; managing tax process improvement projects; managing technical research of tax compliance issues; and maintaining SOX 404 documentation.

Domestic Tax Planning Positions

305 - Tax Executive: Domestic Planning

Primary responsibilities involve providing senior tax counsel in the development of short- and long-term domestic tax strategies and plans.

Responsibilities may include: maintaining and expanding current knowledge of emerging tax issues and developments; providing leadership and direction in the development of federal/state/local income tax strategies and planning to reduce the effective tax rate and increase cash flows; leading and providing tax review and modeling of proposed domestic mergers, acquisitions, dispositions and restructurings; participating in the selection of external legal and other advisors, reviewing their opinions and maintaining relationships with them; providing tax advice, feedback and solutions to senior corporate and operating business executives to ensure that the tax implications of deals and capital planning alternatives are understood and properly considered in their design; identifying and ensuring that appropriate risk-mitigation measures are implemented; participating in the negotiation of deal documents and tax indemnity agreements; and overseeing legal and technical aspects of tax audits, controversies and litigation.



Survey Job Codes and Descriptions

310 - Tax Director: Domestic Planning

Primary responsibilities involve providing tax counsel and participating in the development of short- and long-term domestic tax strategies and plans.

Responsibilities may include: maintaining and expanding current knowledge of emerging tax issues and developments; formulating federal/state/local income tax strategies and plans to reduce the effective tax rate and increase cash flows; providing tax review and modeling of proposed domestic mergers, acquisitions, dispositions and restructurings; supporting the work of external legal and other advisors, reviewing their opinions and maintaining relationships with them; providing tax advice, feedback and solutions to corporate and operating business executives to ensure that the tax implications of deals and capital planning alternatives are understood and properly considered in their design; identifying and ensuring that appropriate risk-mitigation measures are implemented; participating in the negotiation of deal documents and tax indemnity agreements; and overseeing legal, technical and procedural aspects of tax audits, controversies and litigation.

315 - Tax Manager: Domestic Planning

Primary responsibilities involve implementing domestic income tax strategies and plans by providing tax research, modeling, advice and solutions.

Responsibilities may include: maintaining and expanding current knowledge of emerging tax issues and developments; identifying federal/state/local income tax opportunities to reduce the effective tax rate and increase cash flows; researching, and reviewing proposed transactions and restructurings by developing tax-relevant facts, identifying issues, generating and modeling alternative solutions and documenting and presenting recommendations; supporting the work of external legal and other advisors; supporting the negotiation of deal documents and tax indemnity agreements; undertaking due diligence and following up on post-closing tax matters; providing ongoing tax information, feedback and advice to corporate and operating business executives and managers; and participating in legal, technical and procedural aspects of tax audits, controversies and litigation.

Domestic Tax Compliance Positions

405 - Tax Executive: Domestic Compliance

Primary responsibilities involve developing company tax compliance policies and approaches, and overseeing all domestic tax compliance activities.

Responsibilities may include: providing leadership and direction for federal/state/local income, sales/use and property tax compliance; reviewing and approving tax returns, estimates, provisions, deferred tax accruals, tax account reconciliations, and financial statement footnote disclosures; participating in the selection and directing the work of specialized outside tax advisors and maintaining relationships with them; directing tax audit preparation, response, negotiation and resolution; identifying tax exposures and recommending tax saving opportunities to senior executives; providing tax advice, feedback and solutions to corporate and operating business executives and managers; monitoring, testing and maintaining internal controls needed to meet the requirements of SOX 404 as it relates to tax processes and procedures; overseeing technical research of tax compliance issues; and maintaining and expanding current knowledge of emerging tax issues and developments.



Survey Job Codes and Descriptions

410 - Tax Director: Domestic Compliance

Primary responsibilities involve participating in the development of federal/state/local income tax compliance policies and approaches, and directing their implementation.

Responsibilities may include: maintaining and expanding current knowledge of emerging tax issues and developments; directing the preparation, consolidation, review and filing of federal/state/local tax returns, estimates and extensions; directing the preparation, review and approval of quarterly and year-end close reporting – tax provision calculations, deferred tax accruals, tax account reconciliations, and financial statement footnote disclosures; managing tax audit preparation, response, negotiation and resolution; providing tax advice, feedback and solutions to corporate and operating business executives and managers; identifying tax exposures and tax saving opportunities, and formulating related recommendations and financial projections; ensuring that internal controls are in place to meet the requirements of SOX 404 as it relates to tax processes and procedures; leading tax process improvement projects; and directing technical research of tax compliance issues.

415 - Tax Manager: Domestic Compliance

Primary responsibilities involve implementing federal/state/local income tax compliance, ensuring the timely and accurate preparation and review of tax returns, schedules, extensions and payment estimates in line with the company's tax calendar.

Responsibilities may include: maintaining and expanding current knowledge of emerging tax issues and developments; actively managing and providing guidance in the preparation, review and filing of federal/state/local tax returns, estimates and extensions; managing the preparation of consolidated federal and combined state income tax returns; preparing and reviewing quarterly and year-end close reporting – tax provision calculations, deferred tax accruals, tax account reconciliations, and financial statement footnote disclosures; participating in tax audit preparation, response, negotiation and resolution; responding to requests for tax information and feedback from operating business executives and managers; identifying tax issues to be researched and/or referred to senior tax management; managing tax process improvement projects; managing technical research of tax compliance issues; and maintaining SOX 404 documentation.

420 - Senior Tax Specialist: Domestic Compliance

Primary responsibilities involve preparing and reviewing federal/state/local income tax returns, schedules, extensions and payment estimates in line with the company's cyclical tax filing calendar.

Responsibilities may include: utilizing and updating master files for available tax software; compiling required data, performing required calculations and completing work papers; identifying tax issues for referral to senior tax management; compiling data to support audit response and requests for information from taxing authorities; supporting research of tax compliance and planning matters; and expanding knowledge of tax laws, regulations, court decisions, proposed changes and other current tax issues.

Incumbents typically have more than two years of tax experience and tend to be involved in activities that span a relatively wide range of tax complexity. While incumbents may provide technical training and guidance to relatively junior staff, they are not typically responsible fully for staff supervision.

Survey Job Codes and Descriptions

425 - Tax Specialist: Domestic Compliance

Primary responsibilities are similar to those of Position 43 - Senior Tax Specialist: Domestic Compliance, and involve preparing and reviewing federal/state/local income tax returns, schedules, extensions and payment estimates in line with the company's cyclical tax filing calendar.

Responsibilities may include: utilizing and updating master files for available tax software; compiling required data, performing required calculations and completing work papers; identifying tax issues for referral to senior tax management; compiling data to support audit response and requests for information from taxing authorities; supporting research of tax compliance and planning matters; and developing knowledge of tax laws, regulations, court decisions, proposed changes and other current tax issues.

Incumbents typically have less than two years of tax experience and tend to be involved in activities that span a relatively limited range of tax complexity.

International Tax Planning and Compliance Positions

505 - Tax Executive: International Planning and Compliance

Primary responsibilities involve providing senior tax counsel in the development of short- and long-term international tax strategies and plans, developing international tax compliance policies and approaches, and overseeing international tax compliance activities.

Responsibilities may include: maintaining and expanding current knowledge of emerging international tax issues and developments; providing leadership and direction in the development of international tax strategies and plans; leading and providing tax review and modeling of proposed international mergers, acquisitions, dispositions, partnerships and joint ventures; participating in the selection of external legal and other advisors for international issues and transactions, reviewing their opinions and maintaining relationships with them; providing advice, feedback and solutions on international tax issues to senior corporate and operating business executives; providing leadership and direction for U.S. federal tax compliance for income earned from international business operations; overseeing international aspects of tax audit preparation, response, negotiation and resolution; and overseeing and supporting the local tax compliance of non-U.S. business entities.

510 - Tax Director: International Planning and Compliance

Primary responsibilities involve providing tax counsel and participating in the development of short- and long-term international tax strategies and plans, developing international tax compliance policies and approaches, and directing their implementation.

Responsibilities may include: maintaining and expanding current knowledge of emerging international tax issues and developments; formulating international tax strategies and planning; providing tax review and modeling of proposed international mergers, acquisitions, dispositions, partnerships and joint ventures; supporting external legal and other advisors for international issues and transactions, reviewing their opinions and maintaining relationships with them; providing tax information, advice and solutions to corporate and operating business executives; participating in the negotiation of deal documents and tax indemnity agreements; directing and reviewing U.S. federal tax compliance with regard to income earned from international operations; reviewing local tax provisions, monitoring and supporting local tax compliance of non-U.S. business entities; and directing international aspects of tax audit preparation, response, negotiation and resolution.



Survey Job Codes and Descriptions

515 - Tax Manager: Internal Planning and Compliance

Primary responsibilities involve implementing international tax strategies and plans, and international aspects of U.S. income tax compliance, ensuring the timely and accurate preparation and review of required tax filings in line with the company's tax calendar.

Responsibilities may include: maintaining and expanding current knowledge of emerging international tax issues and developments; managing and supporting planning projects and initiatives in areas such as transfer pricing, tax credit utilization, debt push down, thin capitalization, tax treaty, business restructuring, repatriation and other inter-company transaction issues; researching and reviewing proposed transactions and restructurings that involve non-U.S. entities, and presenting recommendations; actively managing and providing guidance in the preparation, review and submission of U.S. filing requirements related to income from international operations; preparing and reviewing quarterly and yearend close reporting – tax accruals and provisions for international operations, foreign tax credits/limitations, deemed dividends from foreign affiliates, assessment of deferred tax assets and liabilities for investments in foreign affiliates, effective global tax rate analysis and related matters; monitoring and supporting local tax compliance of non-U.S. business entities; supporting the work of external legal and other advisors; participating in tax audit preparation, response, negotiation and resolution as they relate to international issues; providing ongoing tax information, feedback and advice to corporate and operating business executives and managers; managing tax process improvement projects; and maintaining SOX 404 documentation.

International Tax Planning Positions

605 - Tax Director: International Planning

Primary responsibilities involve providing tax counsel and participating in the development of short- and long-term international tax strategies and plans.

Responsibilities may include: maintaining and expanding current knowledge of emerging international tax issues and developments; formulating international tax strategies and plans for transfer pricing, tax credit utilization, debt push down, thin capitalization, tax treaty, business restructuring, repatriation and other inter-company transaction issues; providing tax review and modeling of proposed international mergers, acquisitions, dispositions, partnerships and joint ventures; supporting external legal and other advisors for international issues and transactions, reviewing their opinions and maintaining relationships with them; providing tax information, advice and solutions to corporate and operating business executives to ensure that the tax implications of deals and capital planning alternatives are understood and properly considered in their design; identifying and ensuring that appropriate risk-mitigation measures are implemented; participating in the negotiation of deal documents and tax indemnity agreements; and directing legal, technical and procedural aspects of related tax audits, controversies and litigation as they relate to international issues.



Survey Job Codes and Descriptions

610 - Tax Manager: International Planning

Primary responsibilities involve implementing international tax strategies and plans by providing tax research, modeling, advice and solutions.

Responsibilities may include: maintaining and expanding current knowledge of emerging international tax issues and developments; managing and supporting planning initiatives in areas such as transfer pricing, tax credit utilization, debt push down, thin capitalization, tax treaty, business restructuring, repatriation and other inter-company transaction issues; researching, and reviewing proposed transactions and restructurings that involve non-U.S. entities by developing tax-relevant facts, identifying issues, generating and modeling alternative solutions and documenting and presenting recommendations; supporting the work of external legal and other advisors; supporting the negotiation of deal documents and tax indemnity agreements; undertaking due diligence and following up on post-closing tax matters; providing ongoing tax information, feedback and advice to corporate and operating business executives and managers; and participating in legal, technical and procedural aspects of tax audits, controversies and litigation as they relate to international issues.

International Tax Compliance Positions

705 - Tax Director: International Compliance

Primary responsibilities involve directing international aspects of U.S. federal tax compliance, and monitoring, reviewing and supporting the local tax compliance of non-U.S. business entities.

Responsibilities may include: maintaining and expanding current knowledge of emerging international tax issues and developments; directing the preparation, review and submission of U.S. filing requirements related to income from international operations; directing the preparation, review and approval of quarterly and year-end close reporting – tax accruals and provisions for international operations, foreign tax credits/limitations, deemed dividends from foreign affiliates, assessment of deferred tax assets and liabilities for investments in foreign affiliates, effective global tax rate analysis and related matters; identifying tax exposures and tax saving opportunities, and formulating related recommendations and financial projections; directing local tax compliance of non-U.S. business entities; responding to requests for tax information and feedback from corporate and operating business executives and managers; and managing tax audit preparation, response, negotiation and resolution as they relate to international issues.



Survey Job Codes and Descriptions

710 - Tax Manager: International Compliance

Primary responsibilities involve implementing international aspects of U.S. income tax compliance, ensuring the timely and accurate preparation and review of required tax filings in line with the company's tax calendar.

Responsibilities may include: maintaining and expanding current knowledge of emerging tax issues and developments, especially as they relate to international issues; actively managing and providing guidance in the preparation, review and submission of U.S. filing requirements related to income from international operations; preparing and reviewing quarterly and year-end close reporting – tax accruals and provisions for international operations, foreign tax credits/limitations, deemed dividends from foreign affiliates, assessment of deferred tax assets and liabilities for investments in foreign affiliates, effective global tax rate analysis and related matters; monitoring and supporting local tax compliance of non-U.S. business entities; responding to requests for tax information and feedback from operating business executives and managers; participating in tax audit preparation, response, negotiation and resolution as they relate to international issues; identifying international tax issues to be researched and/or referred to senior tax management; managing international tax process improvement projects; managing technical research of international tax compliance issues; and maintaining SOX 404 documentation.

715 - Senior Tax Specialist: International Compliance

Primary responsibilities involve preparing and reviewing U.S. federal tax returns, information forms and other filing requirements associated with international operations.

Responsibilities may include: utilizing and updating master files for available tax software; filing requests for residency certification and information forms for foreign affiliates; compiling required data, performing/reviewing required calculations and completing work papers associated with tax accruals and provisions for international operations, foreign tax credits/limitations, deemed dividends from foreign affiliates, assessment of deferred tax assets and liabilities for investments in foreign affiliates, effective global tax rate analysis and related matters; identifying tax issues for referral to senior tax management; compiling data to support audit response and requests for information from taxing authorities; supporting research of international tax compliance and planning matters; and expanding knowledge of tax laws, regulations, court decisions, proposed changes and other current tax issues, especially as they relate to international operations.

Incumbents typically have more than two years of tax experience and tend to be involved in activities that span a relatively wide range of tax complexity. While incumbents may provide technical training and guidance to relatively junior staff, they are not typically responsible fully for staff supervision.



Survey Job Codes and Descriptions

720 - Tax Specialist: International Compliance

Primary responsibilities are similar to those of Position 73 - Senior Tax Specialist: International Compliance, and involve preparing and reviewing U.S. federal tax returns, information forms and other filing requirements associated with international operations.

Responsibilities may include: utilizing and updating master files for available tax software; filing requests for residency certification and information forms for foreign affiliates; compiling required data, performing/reviewing required calculations and completing work papers associated with tax accruals and provisions for international operations, foreign tax credits/limitations, deemed dividends from foreign affiliates, assessment of deferred tax assets and liabilities for investments in foreign affiliates, effective global tax rate analysis and related matters; identifying tax issues for referral to senior tax management; compiling data to support audit response and requests for information from taxing authorities; supporting research of international tax compliance and planning matters; and developing knowledge of tax laws, regulations, court decisions, proposed changes and other current tax issues, especially as they relate to international operations.

Incumbents typically have less than two years of tax experience and tend to be involved in activities that span a relatively limited range of tax complexity.

Sales/Use/Property Tax Positions

805 - Tax Executive: Sales/Use/Property Planning and Compliance

Primary responsibilities involve providing senior tax counsel in the development of short- and long-term sales/use/property tax strategies and plans, developing sales/use/property tax compliance policies and approaches, and overseeing sales/use/property tax compliance activities.

Responsibilities may include: maintaining and expanding current knowledge of emerging sales/use/property tax issues and developments; providing leadership and direction in the development of sales/use/property tax strategies and plans; participating in the selection of external legal, property valuation and other advisors for sales/use/property tax issues, reviewing their opinions and maintaining relationships with them; providing advice, feedback and solutions on sales/use/property tax issues to senior corporate and operating business executives; providing leadership and direction for all aspects of sales/use/property tax compliance; overseeing sales/use/property tax audit preparation, response, negotiation and resolution; providing leadership for sales/use/property tax process improvement projects.



Survey Job Codes and Descriptions

810 - Tax Director: Sales/Use/Property Planning and Compliance

Primary responsibilities involve directing the development of sales/use/property tax planning strategies and policies, and directing related tax research, analysis, compliance and audit activities.

Responsibilities may include: maintaining and expanding current knowledge of emerging sales/use/property tax issues and developments; formulating sales/use/property tax strategies and plans; directing the preparation, review and filing of sales/use/property tax returns and payments; directing the filing of licensing, annual reports and other supplementary filings required by various jurisdictions; directing the preparation, review and approval of quarterly and year-end tax account reconciliations; directing sales/use/property tax research and analysis; identifying tax exposures and tax saving opportunities, and formulating related financial projections and solutions; directing tax audit preparation, response, negotiation and resolution; directing the review, analysis, tracking and challenge of real estate tax assessments; selecting and directing the work of external property valuation and other advisors, and maintaining relationships with them; providing tax advice, feedback and solutions to operating business executives and managers; and directing sales/use/property tax process improvement projects.

815 - Tax Manager: Sales/Use/Property Planning and Compliance

Primary responsibilities involve maintaining sales/use and/or property tax compliance, ensuring the timely and accurate preparation and review of tax returns and payments in line with the related tax calendar.

Responsibilities may include: actively managing and providing guidance in the preparation, review and filing of sales/use/property tax returns and payments; managing the filing of licensing, annual reports and other supplementary filings required by various jurisdictions; preparing and reviewing quarterly and year-end tax account reconciliations; participating in tax audit preparation, response, negotiation and resolution; managing the analysis, tracking and challenge of real estate tax assessments; supporting the work of external property valuation and other advisors; responding to requests for tax information and feedback from operating business executives and managers; supporting staff communication and training with regard to sales tax issues; identifying tax issues to be researched and/or referred to senior tax management; managing sales/use/property tax process improvement projects; managing research of related tax compliance issues; and maintaining up-to-date knowledge of sales/use/property tax laws, regulations, court decisions, proposed changes and other current tax issues.

820 - Senior Tax Specialist: Sales/Use/Property Planning and Compliance

Primary responsibilities involve processing, preparing and reviewing sales/use/property tax assessments, returns and payments in line with the company's related tax filing calendar.

Responsibilities may include: utilizing and updating master files for available tax software; compiling required data, performing required calculations and completing work papers; maintaining and providing resale certificates as required by vendors; identifying tax issues for referral to senior tax management; compiling data to support audit response and requests for information from taxing authorities; supporting research of tax compliance and planning matters; and expanding knowledge of tax laws, regulations, court decisions, proposed changes and other current sales/use/property tax issues.

Incumbents typically have more than two years of tax experience and tend to be involved in activities that span a relatively wide range of tax complexity. While incumbents may provide technical training and guidance to relatively junior staff, they are not typically responsible fully for staff supervision.

825 - Tax Specialist: Sales/Use/Property Planning and Compliance

Primary responsibilities are similar to those of Position 820 - Senior Tax Specialist: Sales/Use and/or Property Tax Compliance, and involve processing, preparing and reviewing sales/use/property tax assessments, returns and payments in line with the company's related tax filing calendar.

Responsibilities may include: utilizing and updating master files for available tax software; compiling required data, performing required calculations and completing work papers; maintaining and providing resale certificates as required by vendors; identifying tax issues for referral to senior tax management; compiling data to support audit response and requests for information from taxing authorities; supporting research of tax compliance and planning matters; and developing knowledge of tax laws, regulations, court decisions, proposed changes and other current sales/use/property tax issues.

Incumbents typically have less than two years of tax experience and tend to be involved in activities that span a relatively limited range of tax complexity.

Tax Technology Positions

905 - Tax Technology Director

Primary responsibilities involve participating in the development of tax technology policies and roadmaps, and directing their implementation.

Responsibilities may include: maintaining and expanding current knowledge of emerging tax issues and related technology developments; liaising with senior IT management on company-wide IT initiatives, providing input and feedback from a tax-department perspective; providing tax technology advice, feedback and solutions to tax executives and managers; assessing the effectiveness of existing and new technologies with regard to tax process automation, tax document management, tax data integration, tax data warehousing, tax forecasting and tax reporting; identifying technological opportunities to reduce costs and improve functional effectiveness; formulating related recommendations; and directing the implementation and ongoing assessment of tax technology changes.

Survey Job Codes and Descriptions

910 - Tax Technology Manager

Primary responsibilities involve implementing tax technology policies and managing tax process improvement projects.

Responsibilities may include: maintaining and expanding current knowledge of emerging tax issues and related technology developments; actively managing and facilitating tax process and technology projects; identifying and communicating tax functional plans, priorities and project needs for IT staff and/or consultants; managing project progress and performance; managing the testing of new tax systems, tools, fixes and enhancements; developing related system/process documentation and delivering end-user training; and administering access rights and ensuring that new hardware and software are installed and configured for optimized performance.

915 - Tax Technology Senior Analyst

Primary responsibilities involve gathering and articulating business requirements including defining data dependencies and flows.

Responsibilities may include: supporting and administering key tax applications and processes and procedures; assisting in developing and building solutions in alignment with tax technology; performing other job-related duties as assigned, may be expected to enable and administer solutions that support the tax team processes; requires the ability to manage projects; should have a Bachelor's degree preferably in Information Systems with at least 5 years relevant experience.

Tax Legal Positions

1005 - Tax Counsel - Senior Manager

Primary responsibilities involve providing support to deal teams and business units throughout the organization with respect to the tax aspects of pending acquisitions, dispositions, financings, reorganizations, restructurings, and joint ventures, with a view to optimize taxes.

Responsibilities may include: managing all aspects of various worldwide tax projects, including analyzing relevant tax law for tax planning transactions, working with foreign and U.S. tax advisors to understand relevant tax rules; effectively communicate complex technical tax issues to Senior Management and internal/external stakeholders, including the broader finance business unit; exhibit sound business judgment in a fast-paced work environment with ability to proactively manage and prioritize various responsibilities and deliverables; should have at least a Bachelor's Degree and Master of Laws in Taxation (LL.M.) be a Member in Good Standing of a State Bar (U.S.) and have 12+ years of relevant work experience, specializing in structuring and documenting complex M&A transactions, preparing tax memoranda, opinions, and ruling requests; reviewing transaction documents and drafting tax provisions and reviewing and commenting on the tax aspects of financial models.

1010 - Tax Counsel - Manager

Primary responsibilities involve assisting job 1005 with support to deal teams and business units throughout the organization with respect to the tax aspects of pending acquisitions, dispositions, financings, reorganizations, restructurings, and joint ventures, with a view to optimize taxes.

Responsibilities may include: serving as the U.S. federal income tax single point of accountability and be able to identify state income tax and non-income tax issues; negotiating, drafting and reviewing tax provisions in deal documents, manage and develop team members; analyzing relevant tax law for tax planning transactions; prepare and review technical tax memoranda; should have at least a Bachelor's Degree and Master of Laws in Taxation (LL.M.) be a Member in Good Standing of a State Bar (U.S.) and have 8+ years of relevant work experience, specializing in structuring and documenting complex M&A transactions, preparing tax memoranda, opinions, and ruling requests; reviewing transaction documents and drafting tax provisions and reviewing and commenting on the tax aspects of financial models.

1015 - Tax Attorney - Senior

Primary responsibilities involve providing support to deal teams and business units throughout the organization with respect to the tax aspects of pending acquisitions, dispositions, financings, reorganizations, restructurings, and joint ventures, with a view to optimize taxes.

Responsibilities may include: managing all aspects of various world wide tax projects, including analyzing relevant tax law for tax planning transactions, working with foreign and U.S. tax advisors to understand relevant tax rules; effectively communicate complex technical tax issues to Senior Management and internal/external stakeholders, including the broader finance business unit; exhibit sound business judgment in a fast-paced work environment with ability to proactively manage and prioritize various responsibilities and deliverables; should have at least a Bachelor's Degree and Master of Laws in Taxation (LL.M.) be a Member in Good Standing of a State Bar (U.S.) and have 5+ years of relevant work experience, specializing in structuring and documenting complex M&A transactions, preparing tax memoranda, opinions, and ruling requests; reviewing transaction documents and drafting tax provisions and reviewing and commenting on the tax aspects of financial models.

1020 - Tax Attorney - Principal

Primary responsibilities involve assisting job 1015 with support to deal teams and business units throughout the organization with respect to the tax aspects of pending acquisitions, dispositions, financings, reorganizations, restructurings, and joint ventures, with a view to optimize taxes.

Responsibilities may include: serving as the U.S. federal income tax single point of accountability and be able to identify state income tax and non-income tax issues; negotiating, drafting and reviewing tax provisions in deal documents, manage and develop team members; analyzing relevant tax law for tax planning transactions; prepare and review technical tax memoranda; should have at least a Bachelor's Degree and Master of Laws in Taxation (LL.M.) be a Member in Good Standing of a State Bar (U.S.) and have 3+ years of relevant work experience, specializing in structuring and documenting complex M&A transactions, preparing tax memoranda, opinions, and ruling requests; reviewing transaction documents and drafting tax provisions and reviewing and commenting on the tax aspects of financial models.