Position: Tax Associate
Location: Phoenix, Arizona
Compensation: Based on experience
Benefits: Full
Start Date: October 2022

JOB SUMMARY

AWM Capital Tax is actively seeking a Tax Associate. As a Tax Associate, you will be a valuable member on tax engagements, assisting with a variety of tax services that are relevant for our clients, including tax compliance, tax planning and tax research. This position reports directly to our Senior Tax Manager and works collaboratively with the members of our tax & financial team at AWM Capital.

KEY RESPONSIBILITIES

- Preparing partnership, corporate, and individual federal and state income tax returns and all related workpapers.
- Coordinating with our clients and our financial team to gather data for tax return preparation.
- Advise clients and be responsible for delivering high quality tax service and advice.
- Preparing tax projections to determine clients estimated current year tax liabilities and assisting with implementing strategic tax planning strategies.
- Prepare and maintain monthly and annual financial statements for clients.
- Assisting with strategic tax planning including researching federal tax law and drafting technical memos.
- Assisting with IRS audit defense including preparation of IDR responses and drafting issue responses as well as more formal appeals.

JOB COMPETENCIES

The job's success depends on systems and procedures; its successful performance is tied to careful organization of activities, tasks, and projects that require accuracy.

Skills and Attributes for Success:

- Strong technical aptitude and problem-solving abilities.
- Strong analytical, communication (written and verbal), and interpersonal skills.
- Demonstrated project management skillset including project planning and time management.
- Works effectively within established time frames and priorities.
- Proactively manage projects to ensure timely delivery of high-quality analysis and client deliverables.
- Passion for leveraging technology and exploring new technology solutions.

- Build on technical competence by staying current on trends, developments and technical issues and applying them to client facts and circumstances.
- Support the development of client relationships.

EDUCATION & EXPERIENCE

- Bachelor's degree in accounting, finance, or related field
- 1+ years' experience in federal and state taxation
- Preparation experience of federal tax returns for corporations, partnerships, and individuals
- One of the following Accreditations obtained, or in process, or must be able/willing to obtain:
    - CPA
    - Enrolled agent
- Familiarity with the following software/tools is a plus:
    - CCH ProSystem
    - BNA Income Tax
    - QuickBooks