

**Finance & Tax Analyst (Family Office Advisor)**

The **Finance & Tax Analyst** applies the principles of accounting and tax concepts to complete projects of varying difficulty related to all firm-provided services.

Education and/or Experience

Minimum of a Bachelor's Degree from a four-year college or university in Public Accounting or Tax. Applicable internship experience preferred.

Certificates, Licenses, and/or Registrations

Applicants should have Certified Public Accounting designation or be qualified to sit for the CPA exam.

Essential Duties and Responsibilities

- Prepare statistical and account analyses, including a listing of data, forecasting data from one format into another, and calculating percentage relationships
- Prepare and/or coordinate various materials for family meetings with guidance from Senior/Director
- Trace and vouch entries to original documents or sources
- Prepare Federal and state individual income tax returns, extensions and estimates
- Prepare Federal and state corporate income tax returns, extensions and estimates and calculation of schedule M's for corporate tax returns
- Set up tax files and referencing/documenting workpapers for corporate and individual tax returns
- Prepare initial individual income tax projections for estimated tax and year-end planning reasons
- Initial setup and preparation of cash flow projections for individuals
- Prepare compilations and personal financial statements for assigned families
- Review schedules, asset allocations, investment performance reports, and other documents prepared by the firm's investment team
- Perform research for individual and corporate clients
- Draft client correspondence regarding various tax, accounting or Family Office matters
- Prepare client billing for review by Director as assigned
- Mentor interns and/or new employees as assigned

Computer Skills

To perform this job successfully, an individual should have knowledge of QuickBooks, Microsoft Excel, and Microsoft Word. Individuals will also use the following software specialty software packages: Prosystem Tax, Prosystem Trial Balance, BNA Income Tax Planner, and Depreciation Solutions.

Language Skills

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from a group or manager, clients, customers, and other employees.

Mathematical Skills

Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.

**Reasoning Ability**

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

Personal Attributes

- Team Player with strong customer service orientation
- Excellent written, verbal & interpersonal skills
- Ability to think creatively
- Desire to succeed
- Detail-oriented self-starter who takes initiative on projects
- Ability to multi-task in a fast-paced environment
- Willingness and understanding that extra hours will be required during peak time periods

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this Job, the employee is regularly required to talk or hear. The employee is frequently required to sit; use hands to finger, handle, or feel and reach with hands and arms. The employee is occasionally required to stand; walk; climb or balance and stoop, kneel, crouch, or crawl. The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision and ability to adjust focus.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually quiet.

Vogel offers a competitive salary and benefits package that includes health insurance, life insurance, 401(k) with company match, LTD, and generous paid time off.

Candidates must be legally authorized to work in the United States.

The intent of this position description is to provide a representative summary of the major duties and responsibilities performed by incumbents of the position. Incumbents may be required to perform other job-related tasks other than those specifically presented in this description.