Our Personal Financial Services (PFS) professionals are supported by nationally sponsored, world-class technology and tools and a consistent process to deliver high-quality output. Our professionals provide services in the following areas: individual financial planning for high-net-worth individuals and executive groups; individual and fiduciary income tax planning and compliance for our clients.

We currently have an excellent career opportunity for a Personal Financial Services Senior Manager within our Financial Services Office ("FSO") tax practice. The FSO tax practice services clients in the areas of asset management, banking and insurance. Using cutting-edge technology and working with team-oriented colleagues, the successful candidate will manage multiple and challenging financial counseling engagements that serve our clients' overall financial needs and be responsible for managing and coordinating individual and fiduciary income tax planning and compliance for our clients. This position offers excellent opportunities for learning, leadership, and career advancement to the right candidate.

Responsibilities

Contribute to client satisfaction by providing timely and effective responses to client needs and concerns, thereby enhancing long-term working relationships with clients.

Demonstrate an understanding of complex financial planning concepts and income tax matters and effectively apply knowledge to various clients. Develop and deliver timely and high-quality services and work products that meet or exceed client expectations. Identify, pursue, and close business development opportunities. Represent clients before third parties.

Facilitate communications and provide ample assistance to team members by sharing knowledge to develop professionally and enhance service delivery. Maintain a personal commitment to continuing education for professional development and growth.

Thoroughly and accurately analyze information. Prepare quality, practical tax planning for the client's financial situation and arrive at appropriate conclusions.

Participate in client meetings and work within a team environment to deliver integrated advisory services to clients.

Develop budgets, determine resource requirements, and direct/monitor engagements. Actively manage the PCS group by assisting with forecasting future work, delegating work effectively, and resolving staffing issues.

Supervise managers, seniors and staff, review their work product for completeness and accuracy, and prepare it for client delivery. Assist in their professional development.

Leverage technology to continually maximize productivity.

Contribute to a flexible, stable, and team-oriented working culture that fosters development.

Participate in recruiting efforts when necessary.

Perform other related duties, as required.

To qualify, candidates must have:

- a bachelor's degree and approximately 8 years of related work experience; or a master's degree and approximately 7 years of related work experience
- a bachelor's degree with a concentration in accounting, finance, economics or a related field (an advanced degree in tax or law is desirable)
- tax and/or financial planning or relevant experience

- a CPA, EA, JD, or CFP or other related experience or certification relevant to an area of specialization
- proficient knowledge of financial planning and tax laws with specialized knowledge in at least one technical area
- advanced supervisory, interpersonal, analytical, and problem-solving ability
- a proven record in leading teams
- strong written and verbal communication skills
- a commitment to learning in a tax and financial planning technology environment
- proficiency in technology applications

Please send your resume and salary requirement to Kelly.Dempsey@ey.com