



Job Title: Tax Accountant
Supervisor: Tax Services Director
Position Type: Full Time, Exempt
Location: Remote/In-Office (Lake Success, NY)
Date: 09/01/21

Overview/Job Description:

We are seeking a tax accountant to be a key player in our Tax & Legal Affairs department. The position requires an ability to analyze financial information, interpret tax rules, and complete work with accuracy and in a timely fashion. Written and oral communication skills are important, as the job requires continual interaction within our close-knit team, with clients, and at times with the IRS.

The company offers a competitive package of salary and excellent benefits in a family friendly, business casual, and fun working environment. The position will start as 100% remote. Computer equipment and necessary supplies will be provided. The candidate must have their own remote work-space that allows for the quiet needed to conduct calls/video meetings etc. in a professional manner.

Job Description:

- Prepare IRS Forms 990-PF and 990-T, annual returns for private foundations
- Calculate extensions and quarterly estimated tax payments
- Research and respond to correspondence and notices received from tax authorities
- Assist with strategic tax planning for our private foundation clients
- Prepare the necessary state tax filings where applicable

Desired Skills and Qualifications:

- Ability to manage and prioritize multiple projects while meeting statutory and internal deadlines
- Strong technical and organizational skills
- Must work well in a team environment as well as independently
- Confidence to identify problems and recommend solutions in a fast-paced environment
- Excellent written and oral communication skills
- The ideal candidate will be highly motivated, detail oriented, and a self-starter
- Knowledge of K-1s preferred
- Mastery of computer and web-based products not limited to MS Word, Excel, Outlook, Adobe Acrobat and Salesforce
- Experience with GoSystem Tax RS preferred

Required Education and Experience:

- Bachelor's Degree
- Master's Degree preferred
- Minimum 2 years tax return preparation and tax accounting experience
- GL experience a plus

Physical Demands and Work Environment:

- In order to perform successfully the essential functions of this position, an employee must generally be able to do the following: communicate verbally (speak and hear); use hands or



fingers; handle or feel objects, tools, or controls; stand; walk; sit; reach with hands and arms; occasionally lift and/or move up to 15 pounds; and write coherently and grammatically in English. The position requires the ability to see objects, print, and/or images at close range and in the distance, and the ability to adjust focus. Foundation Source will provide reasonable accommodations to enable otherwise qualified individuals with disabilities to perform the essential functions of the position.

NOTE:

- This job description does not include all of the duties that may be required of an employee in this position. Other functions, tasks, and duties may be assigned by the Company, in its discretion. To perform this job successfully, an employee must possess the skills, aptitudes, and abilities to perform each duty proficiently. Educational and experience requirements listed in this document are the minimal requirements for consideration for the position. The set of functions considered “essential” is subject to modification by the Company. Foundation Source will provide reasonable accommodations to enable otherwise qualified individuals with disabilities to perform the essential functions of this position. This job description does not create an express or implied employment agreement; in the absence of a specific written agreement to the contrary, all Foundation Source employees are employed “at will,” and may resign or be discharged at any time, with or without notice.

Foundation Source is an Equal Opportunity Employer, maintains a drug free workplace, and complies with the ADA.

About Foundation Source:

Now in our third decade in business, we provide services to nearly 2,000 family, corporate, and professionally staffed foundations, ranging in size from less than \$1 million to more than \$3 billion. More than 7,200 individuals use our Foundation Source Online® technology platform.

We work in partnership with wealth management firms, law firms, accounting firms and family offices, as well as directly with individuals and families. Since inception, Foundation Source has distributed more than 383,346 grants for our clients, totaling over \$6.9 billion.

Foundation Source is headquartered in Fairfield, CT, with regional offices across the country.