

# United States Jobs Expertini®

## Tax Senior Manager - Ultra High Net Worth

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Company: RSM

Location: Tampa

Category: business-and-financial-operations

We are the leading provider of professional services to the middle market globally, our purpose is to instill confidence in a world of change, empowering our clients and people to realize their full potential. Our exceptional people are the key to our unrivaled, inclusive culture and talent experience and our ability to be compelling to our clients. You'll find an environment that inspires and empowers you to thrive both personally and professionally. There's no one like you and that's why there's nowhere like RSM.

Our Ultra High Net Worth Multi-Generational Families team focuses on post liquidity families and corporate executives who have or require complex estate and income tax planning and compliance. Our team of professionals take a holistic approach by simultaneously analyzing appropriate income tax, estate, gift, generation-skipping, philanthropic, retirement and trust aspects of a client's planning and compliance needs. We collaborate with our clients, including their attorneys, and other advisors, along with subject matter experts both within and outside RSM to achieve our clients' goals.

As a Tax Senior Manager, you will be responsible for the following, which are focused around your technical expertise and ability to work as a collaborative team member to deliver excellent client service:

Advise ultra-high net worth clients on a full spectrum of tax services including wealth transfer, charitable and retirement planning, and tax compliance

Lead the engagement team focused on individual, fiduciary, gift, generation skipping and estate taxation. This includes the planning and execution of client tax engagements that exceed client expectations and RSM profitability thresholds

Anticipate client needs and collaborate with RSM colleagues in specialty tax areas as well as across line of business to build client relationships and support growth

Participate in prospective client proposals and intentionally plan to build new client relationships

Delivers exceptional talent experience by building collaborative teams, developing and rewarding team members

Participate in local and national committees focused on building technical expertise and strategic plans

Develop and sustain strong relationships with clients, centers of influence and other RSM promoters through networking, thought leadership and community involvement

Demonstrates alignment with RSM's core values, vision and strategy while empowering people to work together in meaningful and productive ways across the firm as an enterprise leader

#### Basic Qualifications:

Bachelor's degree in accounting or business-related field

CPA license in one's principal place of business/home state, licensed J.D. or enrolled agent (with approval from regional tax leader)

Minimum of 8 years of experience working in public accounting with an emphasis on private client taxation including working with ultra-high net worth individuals. Most recent years should include experience in leading all aspects of client engagements and driving growth

Proficient in individual, fiduciary, and investment partnership taxation, with an understanding of complex investments and the related tax implications and/or estate, gift and generation skipping transfer taxation

Familiar with multi-state taxation

Strong communication skills (written and verbal) with the ability to lead collaborative teams and manage a book of business that exceeds client expectations

#### Preferred Qualifications:

## LL.M. in Taxation and/or Master's in Taxation

At RSM, we offer a competitive benefits and compensation package for all our people. We support and inspire you to prioritize your wellbeing by delivering personalized, holistic programming for your physical, emotional, financial and community wellbeing. RSM has a generous time off policy with at least 14 paid holidays, wellbeing days and associate and above access to self-managed time off. We offer flexibility in your schedule, empowering you to balance life's demands, while also maintaining your ability to serve clients. Learn more about our total rewards at .

RSM is proud to be an Affirmative Action and Equal Employment Opportunity employer. We are proud to provide our employees with tools to assist them in being successful in achieving both personal and professional goals. We welcome and support all our employees to thrive in an environment free of discrimination and harassment. As an Affirmative Action and Equal Opportunity Employer all applicants will receive consideration for employment as RSM does not tolerate discrimination and/or harassment based on race; color; creed; sincerely held religious beliefs, practices or observances; sex (including pregnancy or disabilities related to nursing); gender (including gender identity and/or gender expression); sexual orientation; HIV Status; national origin; ancestry; familial or marital status; age; physical or mental disability; citizenship; political affiliation; medical condition (including family and medical leave); domestic violence victim status; past, current or prospective service in the US uniformed service; pre-disposing genetic characteristics or any other characteristic protected under applicable federal, state or local law.

Accommodation for applicants with disabilities is available upon request in connection with the recruitment process and/or employment/partnership. RSM is committed to providing equal opportunity and reasonable accommodation for people with disabilities. If you require a reasonable accommodation to complete an application, interview, or otherwise participate in the recruiting process, please call us at 800-274-3978 or send us an email at .

RSM does not intend to hire entry level candidates who will require sponsorship now OR in the future (i.e. F-1 visa holders). However, those candidates who may be recent U.S. college / university graduates possessing 1-2 years of progressive and relevant work experience, excluding internships, in the U.S. or his/her home country would be eligible for hire as an experienced candidate and thus eligible for sponsorship.

Compensation Range: \$137,300 - \$299,000

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