DBA | DILLON BUSINESS ADVISORS

Client Controller (Tax Manager)
Full Time Remote Position

Life is different at DBA! Make a difference and positively impact the lives of our clients and your new team.

Are you looking for more than hustle and grind? We are a growing financial services firm that provides concierge-level service to all aspects of the financial process for our clients. Our firm has cultivated an identity of excellence and trust with our clients and community, so opportunities are available for those looking to grow personally and professionally. We have a proactive approach with our clients, providing guidance throughout the year. We take pride in our thorough knowledge and connection with our clients. We offer a great work environment and strive for innovation and exceeding client expectations! We do not perform any audit, review, or compliance work that requires independence with the firm's clients. We are truly our clients' most trusted advisor.

This is a unique opportunity for an experienced professional to serve as advisor to our clients and a direct resource to Dillon Business Advisors' Client Service Managers. The Controller is the "quarterback" for the client relationship, ensuring timely completion of projects and client satisfaction

Primary Responsibilities
- Preparation and review of business and business owner's income tax returns
- Preparation and review of individual clients' tax returns
- Review of clients' monthly financial statements and provide direct feedback to the client
- Utilize secure software to communicate with clients and people responsible for maintaining relationship with clients
- Train team members in firm processes, general business areas, new developments, and analytical approaches to tax
- Work with internal tax team members on issues and complex matters
- Prepare tax projections and provide tax advisory services to clients
- Work and meet with client team members to build relationships and provide superior client service

Interpersonal/Client Development Skills
- Exhibits time management and organization skills
- Develops an entrepreneurial approach to client service and good working relationships with client personnel
- Builds new and existing client relationships and demonstrates basic knowledge of clients' businesses
- Maintains peer contacts and develops a network of business contacts
- Understands firm ethics and demonstrates them consistently

Desired Skills
- Minimum of a Bachelor's degree in accounting or other related program
- CPA or EA preferred
- Prior experience (2 years) in private/public accounting
- Strong technology skills (Microsoft Office 365: Word, Excel, and Outlook required; QBO, ADP, Thomson Reuters preferred)
- Ability to multi-task and to work independently with minimal supervision
- Experience working in a paperless environment strongly preferred
- Strong interpersonal and relationship building skills
- Team player with a positive – 'can do' approach

Work Life Flexibility
Dillon Business Advisors provides team members the ability to be both professionally challenged and have time year-round to be personally involved with family and friends.

Compensation
Compensation is composed of base pay and bonuses 3 times per year. Other benefits of working with Dillon Business Advisors are 401K with non-discretionary match, profit sharing and cash balance plans, flexible PTO, health insurance available, technology reimbursement, and collaborating with an awesome team.

Apply Confidentially
If interested in applying for this position, please submit a letter of interest, resume, and salary history to Rachel@DillonAdvisors.com. *Be sure to reference the position in the subject section of the email.