

## TAX ADVISOR II

*Wymer Brownlee values diversity of culture and thought and seeks talented, qualified employees in all its operations regardless of race, gender, national origin, religion, sexual orientation, disability, age or any other protected classification. We strive to create an inclusive environment and are proud to be an Equal Employment Opportunity Employer.*

<b>Reports To</b>	Tax Manager	<b>Wage Range</b>	TA2
<b>Date Approved</b>	3.17.2012	<b>Date Last Revised</b>	7.25.18
<b>Exemption</b>	Administrative		

### Job Summary

Our firm is currently seeking a detail-oriented, qualified tax accountant to prepare tax returns and payments, financial statements, and some payroll while maintaining the highest level of client satisfaction. They will research, study, and interpret tax law within all legal guidelines.

In addition to being an excellent communicator, to excel in this role the ideal candidate must demonstrate in-depth knowledge of accounting procedures and time management skills to meet strict deadlines. This position requires travel between Tulsa and Bartlesville.

At Wymer Brownlee Wealth Strategies we enjoy what we do and the people we do it with. We earn the trust and confidence of our team members, clients, their families, and the communities we serve by upholding a personal value system based on honesty, integrity, and gratitude. We support all policies, procedures, and programs which build and sustain our internal culture.

**Essential Functions and Accountabilities** include, but are not limited to

1. Timely and accurately prepare federal, state, local and special tax returns for individuals and businesses.
2. Prepare financial statements, reports, and records by collecting, analyzing, and summarizing information.
3. Prepare payroll.
4. Determine tax liability and prepare fund requests.
5. Manage and maintain a positive client relationship; including service requests, scheduling meetings, assisting in completing paperwork and forms, and providing all information to the client.
6. Build a demonstrated understanding of Wymer Brownlee products and services.
7. Maintain required CPE, technical knowledge, and adherence to all requirements necessary to complete tasks.
8. Constantly verify quality and accuracy of work.
9. Participate in team meetings; bring manager up-to-date and identify any barriers in accomplishing tasks.
10. Adopt and assure the consistent use of repeatable processes to assure the firm maintains operational efficiencies.
11. Other accountabilities as required.

### Wymer Brownlee Core Values

1. Make it Matter
2. We, Not Me
3. Status Quo is Not Our MO

### Supervisory Responsibilities

This position has no supervisory responsibilities

### Experience, Education and Licensure

Bachelor's degree in accounting; a minimum of three years tax preparation experience; demonstrated understanding of QuickBooks and tax software (Ultra Tax CS preferred but not required), experience in multi-client environment; CPA or EA preferred, or the ability to obtain.

### Competencies

#### Accountability/Initiative

Accepts personal responsibility for the quality and timeliness of work. Exhibits attention to detail; acknowledges and corrects mistakes. Makes no excuses or casts blame. Carries their fair share of the workload without waiting to be asked to take action.

Follows up personally and monitors progress to ensure progressive movement of tasks. Can be counted on to complete commitments without being micromanaged.

#### Attendance/Punctuality/Dependability

Comes to work on time every day. Is fully prepared and ready to work at beginning of work schedule and continues until work day is done. Makes appropriate arrangements when adverse weather or other problems might delay on-time arrival. Conforms to work hours and schedule. Lets supervisor and others know immediately when unexpected problems cause absence, lateness, or the need to leave early.

#### Client Focus

Builds client relationships; is aware of their needs to meet or exceed expectations; provides a WOW! Experience. Gains client trust and respect. Actively seeks client feedback on quality of service provided. Does not take issues personally and is quick to resolve client concerns. Applies knowledge of products and services to meet client requirements.

#### Communication Skills

Presents ideas clearly and effectively without offending others. Listens attentively and with objectivity; asks good questions. Communicates well verbally and in writing. Keeps supervisor and coworkers informed; ensures information and ideas are flowing in appropriate directions. Identify and communicate any obstacles in accomplishing tasks.

#### Ethics and Integrity

Builds Trust. Respects and maintains confidentiality. Admits mistakes in spite of the potential for negative consequences. Defines and practices moral and ethical behavior at all times. Avoids situations and associations that could be considered inappropriate. Honest and transparent in all dealings. Upholds and models our core values; acts in such a way as to be the person others look up to.

#### Job Knowledge and Continuous Improvement

Strives to be an expert in their job and serves as a resource to others to help solve problems and improve performance. Actively acquires new skills and input from others. Views constructive criticism and negative experiences as learning opportunities. Open to suggestions and new ideas. Maintain CPE.

#### Managing Change

Adapts easily to changing conditions and work responsibilities. Supports the evolution of the firm and those around you. Able to acknowledge and work comfortably with people of differing styles, temperaments, and preferences. Bounces back quickly from setbacks and frustrations.

#### Professional Presence

Dresses appropriately for the position and role. Presents a well-groomed, clean and neat appearance. Appearance does not call undue or inappropriate attention to self. Appearance represents organization well.

#### Results Focused

Sets high goals and strives to achieve them. Seeks performance feedback and uses it to improve self. Stays on task in spite of distractions and interruptions. Demonstrates persistence; meets deadlines. Exhibits initiative. Has a strong sense of urgency about solving problems and getting the job done.

#### Team Focus

Is aware of how their job affects coworkers and the morale and heartbeat of the team. Maintains an upbeat, positive attitude. Fulfills commitments to other team members. Puts team success ahead of individual success. Balances team and individual responsibilities. Does not monopolize credit for others work.

### **Work Environment**

The work environment characteristics described 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 work environment is typical of an indoor, office setting.

### **Physical Functions**

The physical demands described 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

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. While performing the duties of this job, the employee is frequently required to sit; talk; or hear. The employee is occasionally required to stand; walk; use hands to finger, handle, or feel; reach with hands and arms; and stoop; kneel; or crouch. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision and depth perception.

*I have reviewed the job description.*

*Do you see any reason why you would be unable to perform the duties and accountabilities of this position?*    No    Yes  
*If yes please explain.*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

## Professional Exemption Checklist

Employees who are *in training* to become executive, administration, professional, computer professional, or outside sales employees but do not actually perform exempt duties **do not** qualify for exemption.

The duties portion of the administrative exemption test establishes a two-part inquiry for determining whether an employee performs exempt administrative duties. First, the type of work and primary duty *must* be duties directly related to management or general business operations of the employer or the employer's customers. Second, the primary duty *must* include the exercise of discretion and independent judgment with respect to matters of significance.

To qualify as an administrative employee exemption, *all* of the following tests *must* be met:

**Position Title:** Tax Advisor III

**Reviewed by:** Nancy Roeming

**Date:** 07.25.2018

### Salary Test

1.  The employee must be compensated on a salary basis at a rate not less than \$455 per week (\$23,660 annually);

### Duties Test

1.  The employee's primary duty must be the performance of work requiring advanced knowledge; defined as work which is predominantly intellectual in character and which includes work requiring the consistent exercise of discretion and judgement;
2.  The advanced knowledge must be in a field of science or learning. This includes only occupations that have a recognized professional status. It does not include occupations in the mechanical arts or skilled trades, which may require knowledge of an advanced type but are not in a field of science or learning; and
3.  The advanced knowledge must be customarily acquired by a prolonged course of specialized intellectual instruction.

### Definitions:

#### Primary Duty

"Primary duty" means the principal, main, major or most important duty that the employee performs. Determination of an employee's primary duty must be based on all the facts in a particular case, with the major emphasis on the character of the employee's job as a whole.

#### Work Requiring Advanced Knowledge

"Work requiring advanced knowledge" means work which is predominantly intellectual in character, and which includes work requiring the consistent exercise of discretion and judgment. Professional work is therefore distinguished from work involving routine mental, manual, mechanical or physical work. A professional employee generally uses the advanced knowledge to analyze, interpret or make deductions from varying facts or circumstances. Advanced knowledge cannot be attained at the high school level.

#### Field of Science or Learning

Fields of science or learning include law, medicine, theology, accounting, actuarial computation, engineering, architecture, teaching, and various types of physical, chemical and biological sciences, pharmacy and other occupations that have a recognized status and are distinguishable from the mechanical arts or skilled trades.

#### Customarily Acquired by a Prolonged Course of Specialized Intellectual Instruction

The learned professional exemption is restricted to professions where specialized academic training is a standard prerequisite for entrance into the profession. The best evidence of meeting this requirement is having the appropriate academic degree. However, the work "customarily" means the exemption may be available to employees in such professions who have substantially the same knowledge level and perform substantially the same work as the degreed employees, but who attained the advanced knowledge through a combination of work experience and intellectual instruction. This exemption does not apply to occupations in which most employees acquire their skill by experience rather than by advanced specialized intellectual instruction.

#### Discretion and Independent Judgment

In general, the exercise of discretion and independent judgment involves the comparison and the evaluation of possible courses of conduct and acting or making a decision after the various possibilities have been considered. The exercise of discretion and independent judgment must be more than the use of skill in applying well-established techniques, procedures or specific standards described in manuals or other sources.

The exercise of discretion and independent judgment implies that one has authority to make an independent choice, free from immediate direction or supervision. However, discretion and independent judgment can be exercised even if the decision or recommendation is reviewed at a higher level. Thus, the term "discretion and independent judgment" does not require that the decisions being made have to be final or free from review. The fact that one's decisions may be subject to review and that upon occasion the decisions are revised or reversed after review does not mean that one is not exercising discretion and independent judgment.

The exercise of discretion and independent judgement must be more than the use of skill in applying well-established techniques, procedures or specific standards described in manuals or other sources.