

## Vice President, Diversified Tax

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Diversified, LLC, a leading Tax, Financial Planning and Registered Investment Advisory (RIA) firm with offices in West Chester, PA, Wilmington, DE, and Wayne, PA, Birmingham, AL, Alpharetta, GA, Northampton, MA and Cape Cod, MA is seeking an experienced **Tax** professional to join the firm's Tax Team at Diversified Tax, LLC. The position will be located in the West Chester, PA office.

The candidate must be an accountable, strong leader, self-reliant team member who is comfortable both working independently and with a collaborative Tax Team. This person must manage a variety of tasks simultaneously, have first-class communication skills, be highly meticulous and have diligent follow-through.

**The perfect candidate is interested in a long-term position with upside in a fast-growing company with a family-oriented environment.**

### Key Responsibilities:

- Must be a CPA.
- Supervising staff accountants, administrative staff, and bookkeeping/payroll staff.
- Provide leadership training and support.
- Lead all day-to-day functions of the tax company, processes, procedures, communications, client management.
- Collaborate with the executive team of the Wealth Management company and report to the CEO.
- Review individual, trust and business tax returns prepared by staff accountants.
- Approve client tax return packages for final review & signature.
- Preparing individual, trusts and business tax returns during high volume times and as needed.
- Work with the Financial planning units of the Wealth Management company to Review and/or prepare tax plans and develop complex tax savings solutions for clients.
- This position is ideal for someone seeking a hands on role, blending leadership with firsthand involvement in the day to day.
- If a CPA currently has a book of business and would like to discuss bringing clients over with an equity stake, we are open to the discussion.

### Position Requirements:

- Must be a CPA.
- Experience in a tax preparation firm.
- Experience with UltraTax software a plus.
- Comfortable in a fast paced, high-volume environment.
- World-class organizational and communication skills.
- World-class time management and operational efficiency skills.

Job Type: Full Time