



## Tax Consultant / Estate & Trust Expert Job Description

### Mission Statement

Ross & Moncure is a boutique public accounting firm in Old Town Alexandria known throughout the Washington metropolitan area for its specialty in the taxation of multinationals, journalists, and those in the media or intellectual property industries. The firm provides tax preparation services, highly-customized Professional Employer Organization (PEO) services, and reporting and consulting services relating to the Foreign Account Tax Compliance Act (FATCA) and cross-border compliance requirements. Clients return to Ross & Moncure year after year because of the staff's commitment to service and its consultants' extensive knowledge of the Internal Revenue Service Code, the 68 bilateral income tax treaties between the United States and other countries, and US payroll tax rules and regulations. Ross & Moncure is committed to treating clients as part of a "family" and to making the processes of reporting and paying taxes as painless as possible. Customers should always be treated with respect, and Ross & Moncure employees are expected to go out of their way whenever possible to accommodate clients.

### Summary

Ross & Moncure occupies a very narrow niche within the individual tax preparation market. As a result, we are seeking an individual who is (1) computer-savvy, (2) detail-oriented, (3) good with people, and (4) eager to learn, who we can train to serve our client base. The position would entail using Microsoft Excel and Pro Fx to prepare tax returns for multinational clients and closely-held organizations.

There is also the opportunity *to manage the firm's estate and trust operations*. Our current expert in that field is seeking to reduce her hours, and we would like to support her in doing so.

### Education and Experience

Candidates must have acquired the CPA or EA accreditation, a JD, or an MS with an emphasis in tax.

### Duties and Responsibilities

Key duties:

- The preparation, analysis and review of US individual, corporate, estate and trust tax returns. We can tailor the initial job description to match the candidate's skills and experience
- The generation of tax planning ideas relating to intergenerational wealth transfer and estate settlement
- Extensive client interaction in-person and by phone and e-mail. The candidate must be able to make complex tax-related issues clear in laymen's terms



## Knowledge, Skills and Abilities

The candidate must possess:

- Honed computer skills – Pro Fx (ProSystems tax software), Microsoft Office, QuickBooks, etc.
- Extensive knowledge of estates and trusts
- Preference will go to an individual with strong oral and written communication skills as a key duty will be interacting clearly and consistently with clients. Candidates should be able to convey points concisely in person, over the phone, and via e-mail

## Advantages & Benefits

Ross & Moncure is a small firm with a consultative management style. Significant advantages to working for the firm are: (1) extensive client interaction, (2) job descriptions that can be tailored to the interests of the employee, (3) a lack of bureaucracy, (4) a flexible approach to vacation time in the off-season, and (5) the firm's desirable location in the center of Old Town Alexandria.

During tax season (the first week of February through the second week of April), all full-time Ross & Moncure employees are expected to work on Saturdays. Lunch will be provided by the firm on these Saturdays. The firm also regularly purchases breakfast and snacks for employees during this period. Coffee, tea, spring water, and various sodas are kept in the refrigerator for common consumption throughout the year.

Ross & Moncure pays for the continuing education of its lawyers, Enrolled Agents and Certified Public Accountants. Ross & Moncure does not sponsor candidates for Accounting classes, Business School, or Law School.

All permanent employees of Ross & Moncure are eligible for health insurance once they have been with the firm for three full months. Dental and vision coverage are not included (employees may request a slight monthly salary deduction to have this added). Seasonal and part-time employees are not eligible for health coverage.

All permanent employees at Ross & Moncure are invited to participate in the firm's 401(k) Plan. Ross & Moncure matches each employee's contribution at a rate of 10% of contributions.

Ross & Moncure does not provide parking for employees, though there is an abundance of street parking in the area.

## Contact Us

Please send a CV and cover letter to [rachel@rossmoncure.com](mailto:rachel@rossmoncure.com), if interested.