KAUFMAN & CANOLES
attorneys at law

The Kaufman & Canoles Private Client Services Group practice is seeking a qualified **Private Client Trust & Estate Tax Specialist** to manage complex trust and estate administration and prepare tax returns in our Norfolk office. This is an ideal opportunity for an individual seeking an alternative to an accounting firm, bank trust department or financial services firm.

Our Private Client Services team is the second largest in the state and consists of an integrated group of over 30 lawyers, specialists, paralegals and other support personnel. Unlike many firms, we perform the full range of trusts and estates planning and administration, from the initial meetings with clients to the ultimate administration of their desires, and all tax filings required throughout that process. We are committed to provide thoughtful and cost effective services to the full range of our clients, from those with modest wealth to those with significant estates. Due to our firm's longevity, we have client relationships going into the 4th and 5th generations. We have a reputation of providing the highest level of service amongst our peers and all of the team enjoys deep and rewarding working relationships with both our clients and within our group. We value a pleasant work environment with positive people working at a high level of competency and responsibility.

RESPONSIBILITIES:

1. Prepare complex estate, gift, and fiduciary income tax returns.

2. Research federal, state, and local tax laws related to client tax preparation.

3. Review estate documents for state/federal filing requirements and document provisions.

4. Manage trust and probate administration, drafting correspondence and legal documents, prepare deeds, asset spreadsheets, probate pleadings, and review of bank statements, accountings and/or financial statements.

5. Interact with various banks and brokerage firms via telephone, email, and in-person.

6. Oversee paralegals' work, coach, and provide ongoing training of staff.

7. Provide support to various attorneys and tax preparers in department.

8. Maintain detailed and accurate daily billable hour records.

QUALIFICATIONS:

1. Bachelor's Degree in Accounting or related field preferred

2. Two or more years' work experience in finance or accounting. Tax preparation or trust and estate related work highly desirable.

3. CPA license, CFTA, or other related certifications preferred.

4. Proficiency in Microsoft Office 2016 with working knowledge of Excel. Experience with CCH ProSystem and OneSource is helpful.

5. Demonstrated exceptional mathematical aptitude and able to solve complex problems to develop a beneficial tax strategy for clients.

6. Ability to work both independently and within a team environment.

7. Proven organizational skills with ability to plan proactively.

8. Meticulous attention to detail and the ability to prepare a work product accurately, on-time, and in a cost effective manner.

9. Ability to multi-task, prioritize competing responsibilities, and meet deadlines.

10. Ability to establish and maintain effective working relationships with clients, attorneys, co-workers, and other outside professionals.

11. Excellent oral and written communication skills.

12. Must be a self-starter and have a strong work ethic.

13. Flexible in working additional hours during tax season.

BENEFITS:

We offer competitive salary and a comprehensive benefit package. Benefits include: medical, dental, life insurance, 401(k)/profit sharing, paid time off, paid garage parking, long term and short term disability.