

Manager or Senior Consultant | Severance Tax – Dallas

Hiring organization
Invoke Tax Partners

Employment Type
Full-time

Job Location
Dallas, TX

Date posted
October 28, 2024

Description

The Severance Tax Senior Consultant or Manager's primary responsibilities are to identify Severance tax savings opportunities for multi-state clients and direct staff in day to-day operations. The incumbent will be meeting with clients and/or taxing authorities, preparing correspondence, researching issues, completing data reconciliations, completing exemption and marketing reviews, defending severance tax audits and preparing tax authority filings. The Ideal candidate will have experience in TX and other Oil & Gas states. Some travel required (up to 25%).

Responsibilities

- Reviews and finalizes staff's audit/refund tax decisions and filings
- Reviews client and production data for tax savings opportunities
- Mentoring staff and managing staff workload
- Exemption identification and application services
- Conduct Marketing Deduction Reviews
- Drafts filings for refund claims and various other administrative replies
- Responds to client inquiries and prepares documentation requests from state agencies
- Reconciles tax returns with client data
- Travels to client locations to gather and copy tax returns, invoices, purchase orders, and other documentation to use in audit/refund process
- Other duties as assigned
- Delegation of project work to staff
- Initial person for staff to address project issues/concerns
- Mentoring, training, and/or developing staff
- Delegation of projects
- Manager will have final review of audit/refund schedules and other documents prepared by Senior Consultant
- Responsible for completing all assigned tasks with minimal manager oversight and be able to meet deadlines

Qualifications

- Bachelor's Degree required in Accounting/Finance
- At least 4 years of experience in Severance Tax Consulting
- Multi-State Severance Tax Experience
- Proficient in Access
- Demonstrates knowledge of basic tax research
- Experience in conducting Severance Tax Refunds and Audit Defense