Downloaded from <https://www.velvetjobs.com/job-descriptions/tax-associate>

# Example of Tax Associate Job Description

Our company is growing rapidly and is looking to fill the role of tax associate. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don’t fill all of the qualifications, you may still be considered depending on your level of experience.

## Responsibilities for tax associate

* Process data and convert it to a reviewable product
* Work within a small team environment to deliver integrated family office services to clients
* Maintain a personal commitment to continuing education
* Review all US federal and state tax returns prior to filing with the IRS and state jurisdictions
* Prepare quarterly estimated tax calculations and review US federal, state and city tax return information for the US management companies
* Prepare tax information and respond to limited partner queries
* Manage portfolio company advisors and tax functions to ensure portfolio holding company tax returns are filed on a timely basis
* Organize the annual tax timetable and prepare tax information to ensure timely estimated payments for select portfolio companies, for management entity tax reporting and payments of tax liabilities
* Monitor on-going correspondence and dealings with the IRS and state jurisdictions for all company entities
* Coordinate with advisors and prepare tax memos on numerous ad hoc special projects

## Qualifications for tax associate

* Bachelors or Masters degree in Accounting, Finance or related field is required
* 1 years of tax experience in a public accounting firm preferred
* Internship experience in a public accounting firm strongly preferred
* Review Federal and State tax estimates and returns that are prepared by administrator
* Review complex tax allocations for private equity firms and hedge funds
* Review ECI and FDAP withholding forms, maintain process for withholding throughout the year