



Example of Tax Administrator Job Description

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Our company is hiring for a tax administrator. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for tax administrator

- Review and identify tax related issues and resolve in a timely manner
- Assist in undertaking regular reviews to ensure that the pool location of clients' assets and tax applications equate to their circumstances and any change to circumstances
- Assist in ensuring that the Bank is at all times positioned to conform to tax legislation, taking appropriate action as directed to identify and eliminate any risk which may potentially result in the failure of an audit or lower client service standards
- Assist in reconciliation of Agents' reportable income reports and the resolution of all differences on a timely basis
- Documentation Control including checking validity, change of client circumstances, renewals, account closures, monitoring and review of Canadian and US documentation and segregation
- Assisting with producing annual tax reporting to authorities, conducting reconciliations to ensure accurate 1042 and/or 1099 reporting, data extraction and preparation of annual client reporting
- Scanning and tracking tax notices received, and coordinating with tax team members to resolve notices
- Maintaining the electronic filing system
- Your responsibilities will include working with the estate settlement teams and financial institutions to investigate, identify and collect all tax information required to prepare personal and trust tax returns

Qualifications for tax administrator

- Mentoring TSM and TWS is helpful but not required
- This is not an application DBA position but may have some ETL
- ETL experience is not required
- On-boarding documentation to ensure valid documentation is received in line
- Assist with reporting to IRS and/or relevant tax authorities on an annual
- Calculation of global