

# Position Specification

## Tax Manager

### ***The Company***

Our client is an international real estate group of operating and investing units with offices and developments in select niche markets. Founded in 1988, the company is recognized globally as a builder and owner of world-class properties. Their customers are large office space users and large corporate brands seeking build-to-suit facilities.

### ***The Position***

#### ***Location***

Southwest United States

#### ***Overview***

The Tax Manager is responsible for the efficient, accurate, complete and timely review of all tax returns for 100+ entities. They must possess strong technical knowledge of federal and state tax planning and compliance, along with, well-developed and applied management and supervisory skills. The Tax Manager makes decisions on all, but the most unusual, tax decisions. They are resourceful, take initiative and possess excellent time management and organizational skills. In addition, they demonstrate strong written / oral presentation skills.

#### ***Reporting Relationship***

This position will report to the CFO, but will be working very closely with the Holding Company CFO.

#### ***Responsibilities***

- Maintain Entities List (100+):
  - Federal and State tax reporting requirements
  - Status reporting
- Review tax packages from CFO of company accounting departments:
  - Evaluate for errors and completeness
  - Evaluate for consistency in reporting
- Submit tax packages to outside tax firms for preparation and evaluate returned tax packages from outside firms for accuracy and appropriate positioning / proper alignment with other entities.
- Assemble tax information for investors and Issue K-1's.
- Address all tax questions for:
  - Banks
  - Investors
  - CEO
  - EVP – Director of Capital Markets
  - General Counsel

- Review financials for tax reports.
- Coordinate and act as point of contact for accountants, law firms, tax and estate matters.
- Address all tax audits and / or tax controversies.
- Address all US reporting requirements for non-US based assets and coordinate with non-US reporting.
- Provide tax forecasting / planning for CEO and all affiliated entities in line with their strategic vision.
- Understanding of the related entities and how they all tie together.
- Understand multiple entity reporting.
- Provide tax planning.
- Manage property tax consultants and outside accountants.
- Work closely with company family office and coordinate the timely filing of all family related tax returns.
- Coordinate all financial information needed for tax return preparation with company's accounting staff.
- Ensure compliance with company's policies and procedures.
- Lead staff and senior accountants to employ methods that will accomplish objectives in a timely manner.
- Lead planning meetings with staff and senior accountants to establish budget guidelines and discuss pertinent issues related to client work.

## ***The Candidate***

### ***Education***

Bachelor's Degree in Accounting, Finance or related field. An advanced degree in accounting and/or taxation is preferred. This person must be CPA.

### ***Professional Qualifications***

The successful candidate will possess a strong tax background in the public accounting field defined as minimum of four to six years. Ideally the successful candidate will have experience working with multiple clients in a Big 4 or regional CPA firm, or family office with multiple investment holdings. An understanding of real estate and partnership tax reporting and tax planning for various and related taxpayer entities.

- Experience working in a family office environment.
- A solid understanding of foreign tax credit rules, limits and planning opportunities, and modeling, plus sourcing rules of income, deductions and losses, along with characterization of income and transactions.
- Experience in handling multiple engagements concurrently.
- Track record of establishing priorities and ensuring completion and delivery of work in a timely manner.
- Able to lead and to serve and know when to listen and reflect and when to take decisive action. Have demonstrated a willingness to devote the hours necessary to assure that projects are completed on a timely basis.



**Personal Characteristics**

- An authentic, approachable individual with high integrity, whose personal and professional values are consistent with company's vision and culture.
- Unquestioned integrity. A person of the highest moral and ethical behavior.
- A team player who has strong business acumen, an entrepreneurial spirit and is self-confident.
- A good listener with a sense of humor.
- A straight shooter and a direct, honest communicator who is not apt to "exaggerate".
- Someone who is aware of his or her capabilities, limitations and growth potential.

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**To learn more about this opportunity or provide a confidential referral, please contact:**

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