

Job Description

Position: Tax Manager – Finance Team

Position Overview:

The Tax Manager will be responsible for the development and execution of the tax compliance program for the private equity real estate funds. This position will be critical to ensure timely and accurate filing of tax returns, effective communication with investors, and organization of supporting data to minimize tax liabilities and exposure to penalties/interest. The Tax Manager supports the tax function within the finance team and reports to the Director of Taxation.

Responsibilities:

- Management of the income tax compliance process to include:
 - Oversight of tax return filings to ensure appropriate documentation is retained and referenced as necessary
 - Management of the tax calendar to ensure all returns and estimates are timely filed
 - Planning and management of Big 4 and Regional public accounting firm compliance engagements during tax compliance season
 - Oversight of seasonal tax professionals hired as tax temporary or permanent staff
 - Collaboration with the Rockbridge accounting team to identify/source the information necessary for tax return compliance
 - Review of tax returns prepared by public accounting firms
 - Management of tax notices from various taxing jurisdictions, including research, communication with states and audit assistance as necessary
 - Support for the firm's private equity fund investors by delivering schedules K-1 in a timely manner, responding to investor inquiries and completing any supporting workpapers/analysis as requested
- Lead/participate in special projects and analysis. Examples include historic tax credits, purchase price allocations, cost segregation studies, real estate tax structures and unrelated business income calculations.
- Proactively evaluate policies and procedures for all tax-related activities and develop potential process improvements or solutions as appropriate.

Qualifications

- Minimum of 5 years of progressive experience in public accounting (or equivalent industry experience)
- Partnership taxation experience is required. Industry experience in real estate, private equity or financial services is strongly preferred
- Bachelor's Degree in Business, Finance/Accounting
- Certified Public Accountant (CPA) license preferred
- Client-service oriented individual with a high level of intellectual capacity, curiosity, and integrity
- Excellent project management skills and proven ability to multi-task within a collaborative and fast-moving environment
- Ability to work independently and accurately while meeting deadlines
- Strong written and oral communication skills and ability to present solutions to management and other business partners

Company Overview:

Headquartered in Columbus, Ohio, Rockbridge is a private equity real estate firm with a focus on hospitality investments. Rockbridge has formed and managed seven real estate funds over more than fifteen years. Since 2000, Rockbridge's team has invested in over 200 hotels in 38 states as part of over \$5 billion of transaction value.

Contact Information: ahdavidson@rockbridgecapital.com