

Job Description

Title

Senior Tax Analyst

Overview

The position will report to the Director of Taxation and support the tax function within the finance organization. The tax analyst role will be critical to ensure timely and accurate filing of tax returns, effective investor communications, and organization of supporting data to minimize tax liabilities and exposure to penalties/interest.

Responsibilities

- Assist with tax return preparation, including review of returns and coordination with outside accounting firms to provide information in a timely manner
- Maintain tax calendar to ensure all returns and estimates are timely filed
- Research tax notices from various taxing jurisdictions and assist with audits as required
- Respond to investor inquiries and complete supporting workpapers/analysis for investor requests as needed
- Collaborate with other staff to account for book/tax adjustments, closing journal entries and account reconciliations
- Participate in special projects and analysis as necessary, examples include historic tax credits, purchase price allocations, and unrelated business income calculations
- Identify efficiencies and process improvements to streamline processes for all tax-related activities

Qualifications

- Minimum of 2-4 years of progressive experience in public accounting (or equivalent industry experience)
- Partnership taxation experience is required. Industry experience in financial services, private equity or real estate a plus.
- 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

Rockbridge is an investment platform with nearly two decades of experience investing in real estate and operating companies. We've made over 200 investments in 38 states in transactions worth approximately \$5 billion. Through our deep in-house experience and strong relationships, we have delivered a long track record of attractive risk-adjusted returns across multiple cycles. For more information go to www.rockbridgecapital.com.