

## POSITION SPECIFICATION

---

### TAX SENIOR MANAGER – C-CORPS & FAS 109 SPECIALIST

For

**MOSS-ADAMS LLP**

---

**The Client:** Moss Adams LLP provides [accounting](#), [tax](#) and [consulting](#) services to public and private middle-market enterprises in [many different industries](#). Founded in 1913, and headquartered in Seattle, Washington, Moss Adams has 19 practice offices in California, Washington, New Mexico, Arizona and Oregon.

Moss Adams has two affiliate companies — [Moss Adams Capital LLC](#) and [Financial Security Group LLC](#) — which allow them to offer their clients additional services such as investment banking, and asset management. In addition, Moss Adams provides consulting services in a variety of areas including: business consulting, claims resolution, information technology, litigation, mergers & acquisitions, personal wealth, research, risk management, SEC/corporate finance and valuation.

Moss Adams is now the 11th largest accounting and consulting firm in the U.S., and the largest headquartered on the West Coast. Its staff of 1,900 includes more than 250 partners. Moss Adams is also a founding member of [Moores Rowland International \(MRI\)](#), an international network of firms in over 80 countries that provide global business services to clients involved in international trade.

They consistently are voted "[Best Accounting Firm](#)" in the North Bay!

The Santa Rosa office is located in Sonoma County, in the heart of California's Wine Country and located just an hour's drive north of San Francisco. Their Santa Rosa office currently employs approximately 70 people. They have been in Santa Rosa for over 30 years, and look forward to continued growth. Within their practice, they provide business assurance and tax services, as well as financial management and consulting services, to middle market companies in several industries within the Northern California region. Their industry expertise includes: manufacturing and distribution, food processing, construction, wineries, hi-tech and international.

Position Description: Tax Senior Manager – C-Corps & FAS 109 Specialists  
Moss Adams LLP  
Version: 1.0  
Copyright © Mitroff Consulting & Associates;  
August, 2009  
Page 1 of 5

For additional information, visit their web site: [www.mossadams.com](http://www.mossadams.com).

**Location:** This position is based in the Santa Rosa, California office of Moss Adams.

**Reporting Relationships:** The candidate will report to The Office Tax Leader. Peers of the candidate will include four Tax Senior Managers.

**Professional Requirements:** The candidate must possess a broad spectrum of skills and will have a breadth of experience that will immediately inspire confidence. The following may be included in the candidate's background:

- A. proven, current tax experience obtained within a public accounting firm of at least seven years;
- B. a CPA designation is required;
- C. proven, successful experience with C-Corps and corporate tax provisions is mandatory;
- D. proficiency in corporate, individual and partnership taxation;
- E. solid skills in equity compensation loss limitations, FIN 48, reorganizations, M&A is a plus;
- F. at least three years experience mentoring, supervising, and training Seniors and Managers within a public accounting firm is required;
- G. capable of managing multiple Client engagements in addition to completing tasks related to business development;
- H. experience in technology industry, while not required, is desirable;
- I. able to communicate effectively with financially sophisticated constituencies;
- J. educational credentials that indicate the candidate has been well schooled and is trained to think and communicate in a meaningful

way; a Bachelor's degree in Accounting, Finance or other related field is required. A Master's degree in Taxation is a plus.

### **Professional**

**Responsibilities:** The candidate will help grow the tax practice of Moss Adams. The candidate will give special attention to the following key responsibilities over the next year and on an ongoing basis:

1. provide review of returns, planning, research and compliance;
2. develop and sustain excellent Client relationships;
3. assume responsibility for the calculation and analysis of proprietary tax strategies for Clients and utilizing one's technical knowledge assist on all tasks associated with tax engagements;
4. mentoring, training and supervising several Seniors and Managers simultaneously is a crucial aspect of further development of the tax practice and an integral part of this position;
5. tirelessly work towards unquestionable Client retention and satisfaction that results in Clients being enthusiastic references; sustaining excellent Client relationships;
6. identify, analyze, and define creative solutions for a wide range of complex tax issues;
7. serve as one of the firm's spokesperson to external constituencies;
8. work with others in the Firm in making recommendations concerning business and tax planning strategies.

### **Personal**

**Characteristics:** The following will be important to the development of the Client's culture and attitude for success:

- a. an individual with a commitment to excellence and clear communication who values making a team contribution in a strong, lean, and performance-oriented culture; entrepreneurial;
- b. highly motivated to excel in their role as a tax professional;

- c. capable of working with a wide variety of individuals and skill sets both in the details and at the global level;
- d. must be a “doer” as well as a delegator; able to work under pressure and meet deadlines;
- e. outstanding written and oral communication skills; a perceptive listener; a style that demonstrates a comfort level in dealing with all levels of an organization;
- f. capable of making public presentations in front of diverse groups; strong presentation and organizational skills;
- g. driven to achieve and grow personally and professionally; competitive; an ambitious team player; persistent but not stubborn;
- h. possess high energy level that demonstrates a consistently upbeat and enthusiastic attitude; an ability to exude excitement about the Moss Adams’ services; oriented to working in a growth environment;
- i. a balanced individual, both personally and professionally, with a sense of humor and ability to have fun; someone who shows a lifetime effort to grow and be a contributor;
- j. must be flexible and able to travel up to 6 weeks per year.

**Physical Requirements:**

The finalist must be able to work on the computer, use the telephone, and safely operate a motor vehicle. S/he must have vision sufficient to read handwritten and printed documents and computer screens; speech and hearing sufficient to communicate by phone, in person and to address groups; manual dexterity sufficient to use a variety of office equipment and tools, computer keyboards, and to manipulate papers.

**Mitroff Consulting:**

Mitroff Consulting & Associates is an executive search firm. We are working with Moss Adams to identify candidates for the position indicated on this position specification. This specification is intended only for the use of the individual to whom it is addressed and may contain information that is privileged, confidential, and exempt from

disclosure. If the reader of this document is not the intended recipient, you are hereby notified that any dissemination, distribution, or copying of this communication or the information contained herein is strictly prohibited unless authorized by Mitroff Consulting & Associates.

For more information, please contact Mitroff Consulting & Associates, 954 Brown Street, St. Helena, CA 94574; voice: 707-963-8410;

Email: [norman@normanmitroff.com](mailto:norman@normanmitroff.com)

Web Site: [www.normanmitroff.com](http://www.normanmitroff.com).

*Please note: All correspondence with Mitroff Consulting & Associates is confidential.*

*Our client and Mitroff Consulting & Associates are committed to an equal opportunity hiring policy and work environment.*