

POSITION SPECIFICATION

TAX SENIOR MANAGER – WEALTH SERVICES

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.

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

Reporting Relationships: The candidate will report to Jay Silverstein, JD, LLM. Peers of the candidate will include other Senior Managers of the office.

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 public accounting and/or legal experience of at least five years with outstanding tax experience in estate and gift tax returns and fiduciary income tax returns;
- B. a CPA designation or JD is required;
- C. solid skills in estate and trust income taxation as well as estate planning for businesses and their owners; solid experience with management succession and ownership transition;
- D. well versed in business entities (i.e., Corporations, S-Corps, Partnerships and LLCs); skilled in understanding business' cash flow;
- E. experience in manufacturing and distribution, food processing, construction, wineries, health care, auto dealers, and hi-tech, while not required, is desirable;
- F. able to communicate effectively with financially sophisticated constituencies;
- G. 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.

Professional

Responsibilities: The candidate will help grow the tax and wealth services 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. assist in developing and growing the wealth services and estate planning practice of Moss Adams with emphasis upon estate and ownership transition planning for closely held businesses owners and high net worth individuals;
2. tirelessly work towards unquestionable Client retention and satisfaction that results in Clients being enthusiastic references; sustaining excellent Client relationships;
3. identify, analyze, and define creative solutions for a wide range of complex tax issues;
4. provide tax analysis and related consulting services to corporate and partnership entities as well as their affiliates;
5. conduct research and oversee tax research projects for mid-tier Clients within diverse industries; must have proven, demonstrable research skills;
6. prepare and review fiduciary income tax returns, and estate and gift tax returns;
7. mentor, train and supervise several staff accountants simultaneously;
8. provide tax and wealth management services to the various Clients of Moss Adams, primarily in manufacturing and distribution, food processing, construction, wineries, health care, auto dealers, and hi-tech;
9. serve as one of the firm's spokesperson to external constituencies;
10. 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. capable of working with a wide variety of individuals and skill sets both in the details and at the global level;
- c. must be a "doer" as well as a delegator; able to work under pressure and meet deadlines;
- d. outstanding written and oral communication skills; a perceptive listener; a style that demonstrates a comfort level in dealing with all levels of an organization;
- e. capable of making public presentations in front of diverse groups; strong presentation and organizational skills;
- f. driven to achieve and grow personally and professionally; competitive; an ambitious team player; persistent but not stubborn;
- g. 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;
- h. 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;
- i. 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.

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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.