

THE SMITH GROUP



EMERALD ADVISORS  
LLC

### **Certified Public Accountant Job Summary (CPA)**

Emerald Advisors, LLC is a Bellevue based fiduciary wealth management firm. We provide a high touch experience for our affluent clients. We value integrity, expertise, adaptability, and a growth mindset. We are looking for a motivated and experienced CPA to provide tax service and advice for our clients. We build relationships to last so the applicant must be able to communicate clearly and effectively, gain trust with our clients while executing necessary tax preparations, and be able to manage complex financial situations.

#### **Responsibilities Include:**

- Collaborate with staff on income tax strategies, preparation, estate, retirement, investment and/or insurance planning
- Organize and update accounting records both digital and physical when required
- Represent our clients with IRS, State or other audits
- Maintain accurate financial records for clients including running detailed audits to ensure accuracy
- Review completed tax forms and provide recommendations
- Research and resolve tax and accounting issues affecting our firm and/or clients
- Develop and maintain strong relationships with clients through ongoing communication and exceptional service
- Report to our Managing Director regularly
- Establish accounting policies and procedures while staying up to date on regulation changes or industry developments

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**Credentials and skills required:**

- Active CPA certification required
- Master in Tax required
- 5 + years' experience in public accounting (may consider less for the right applicant)
- Experience with Lacerte or equivalent tax software
- In-depth tax knowledge at the local, state, and federal levels regarding individual income tax returns as well as estate tax returns
- Audit experience with IRS and state tax authorities (optional)
- Dedicated to providing exceptional customer service for clients, creating an exceptional client experience both in person and through virtual tools
- Self-motivated, manages time well, highly organized, and works well with accumulative deadlines and workflows
- Strong attention to detail

This is a full time position (approx. 40 hours per week) and will include benefits. Flexible working hours and occasional remote working will be considered. Salary is commensurate with experience.

Please send resume and cover to [info@emerald-tsg.com](mailto:info@emerald-tsg.com)