



ElementsCPA is on a **mission** to help entrepreneurs design their business and finances for what truly matters. We do this by helping each owner think creatively and critically about their **business model** and **profit model**, then supporting those with **elegantly designed** cloud finance platforms and pro-active tax plans.

The role of **Tax & Accounting Designer** is foremost to lead conversations with entrepreneurs on **how to be smart** when it comes to their income tax and to **reduce** the otherwise **natural stress** around the tax part of their business. This includes making strategic decisions such as choice of optimal tax structure, answering day-to-day customer 'quick tax questions', preparing and reviewing business and individual income tax returns, and working with underlying cloud-based finance platforms. (*More detail below...*)

## **OUR FIRM'S IDENTITY, HISTORY, & FUTURE**

ElementsCPA was founded in 1977 and transformed itself starting in 2011 to more deeply help entrepreneurs shape their future. Today it delivers a connected suite of cutting-edge solutions that it created to empower business owners to articulate their vision and bring it to life.

Our founder David G. Simmons, CPA built the firm over the early decades through traditional accounting services offered to small businesses and individuals, cultivating a reputation of caring, support, and integrity along the way. He was joined in 2002 by his son Adrian G. Simmons, CPA who left KPMG and by 2011 started more actively steering the strategy of the firm. In 2014, Adrian officially bought out his father and completed the final transformation including re-branding the firm, re-designing our value proposition to the future, re-positioning to a narrower target market, re-architecting around cloud-based systems, and more.

Today our team works with around 85 business owners in the technology and service industries with gross revenues from \$500k to \$5m to achieve (1) a **Clarified path** through business coaching and CFO insight, (2) **Tech-enabled finances** using 21st-century cloud apps, and (3) an **Optimized tax** through pro-active planning and support.

We're excited for what the future holds as we extend the offerings we've innovated (such as Simple Path™ strategy sessions, MyCFO™ sessions, Financial Design Method™, Tax Optimizer™, Elements Foundation™, and more) deeper into the markets we serve, while also refining and creating

new tools (such as the Four Activities Scorecard™, Elements Rhythms™, and more).

## THE TAX & ACCOUNTING DESIGNER ROLE

The *Tax & Accounting Designer* makes a difference in the lives of entrepreneurs by enabling them to know the latest tax knowledge is being applied to their circumstances, answering their questions accurately and in a way they understand, suggesting opportunities to save tax dollars at points it makes sense, preventing the disruption that comes from non-compliance, avoiding surprises at tax filing time, and easing stress whenever tax correspondence arrives.

Our team will rely on the *Tax & Accounting Designer* to:

- Hold annual Tax Projections with business owners to forecast their tax liability and avoid surprises come tax filing time.
- Hold tax interviews and perform technical reviews for 1120S, 1120, 1065, and 1040 returns to ensure accuracy and optimization.
- Guide strategic tax planning conversations such as choice of tax entity, health/benefit tax plans, retirement tax plans, limited multi-state activity, accelerated depreciation elections, 1031 implications, etc.
- Reply to income tax notices and represent a customer if a tax examination arises.
- Stay on top of federal and state tax developments so we can offer and apply the latest guidance to customers. Perform deeper tax research and synthesize in tax memorandums when warranted.
- Provide easy-to-understand guidance to customer 'quick tax questions'.

The *Tax & Accounting Designer* also possesses an accounting and technology proficiency which helps them fulfill their tax responsibilities as well collaborate with our team to:

- Assess cloud accounting books for problem areas to help keep customer records on track.
- Think through elegant finance workflows which apply available technologies in smart ways that are simple-to-use and result in accurate finances.

- Support customer 'quick questions' that arise such as how to add an employee in a new state in our cloud payroll platform, how to post a real estate sale with gain/loss to the books, how to be sure company retirement plan contributions are properly posted, etc.

## WHAT'S NEEDED TO SUCCEED IN THE TAX & ACCOUNTING DESIGNER ROLE

Skills that enable the Tax & Accounting Designer to achieve success are –

- Ability to listen to customers, know their story and personalities, understand 'the question behind the question', empathize, and facilitate warm and personal conversations that truly help them advance their goals.
- Ability to dig into digital tax research tools, pull together relevant references, critically think through applicability to customer situation and goal, and recommend most effective path forward.
- Ability to hold to integrity when presented with opportunity to compromise quality of work or honesty. Taking pride in the craftsmanship of your work.
- Ability to laser-focus on the multitude of details and data points in tax preparation and review to ensure they are fully and accurately captured, while zooming out at the final stage to see the 'big picture' and ensure nothing is missed.
- Native comfort with computers and web technologies which will enable use of our internal systems (like Accelo, ShareFile, Microsoft 365, etc.) as well as the cloud finance apps we support for customers (Xero, Hubdoc, Gusto, etc.).
- Ability to track and follow-up on customer communication, information requests, government contact, etc.
- Ability to think creatively to see the big picture goal, think through problem areas and untapped opportunities, then construct solutions that achieve all identified objectives.
- Ability to collaborate with team by asking questions when needed, sharing critical information, performing clean hand-offs between team members, and being supportive of other members' and our team's overall development.
- Ability to weekly & monthly assess your assigned project pipeline and map out at a high level

your personal capacity plan for the week & month. Then day-to-day, knock out the tasks you set out for yourself, adapting to natural ebbs & flows to reach the end of week & month having closed out what needed to be done.

Qualifications required to apply:

1. Skills listed above
2. Active CPA license
3. 3-5 years or more performing technical reviews of business and business owner income tax returns.

## SUPPORT & COMPENSATION PROVIDED FOR TAX & ACCOUNTING DESIGNER ROLE

Compensation and support the company provides for the Tax & Accounting Designer are:

- A positive workplace that treats each team member as a human, provides them with freedoms that accompany their proven ability to fulfill their role responsibilities, and a spirit of camaraderie and fun.
- Annual compensation package between \$75k to \$85k depending on demonstrated skills.
- Eligible for Health Reimbursement Arrangement up to \$5,000 for pre-tax treatment of qualifying health costs.
- Eligible for the company Traditional/Roth 401(k) with automatic 3% company contribution regardless of participation.
- Eligible for remote work.
- Seven paid holidays every year, including your birthday.
- Five weeks paid personal days every year.
- Annual professional education stipend.

## TAKE THE FIRST STEP

If you'd like to join our team in this role pursuing the mission of impacting entrepreneurs together, we'd love to meet you! Please take the first step –

1. Reply within the Indeed platform with your favorite movie, the reason somebody is one of your personal heroes, and what about the world of tax interests you. (Contact initiated outside the Indeed platform will automatically prevent consideration.)
2. With the reply, attach a one-to-two page resume and a paragraph about how your background connects to this role.

We'll then reach back out about scheduling a video chat, followed by an extended meet-up, a paid beta day, and a formal offer.

We look forward to getting to know you!