



CREATIVE PLANNING

Title: **Tax Director – National Tax Office**

Location: Any Location/Hybrid/Remote

JOB SUMMARY

The Creative Planning **National Tax Office (NTO) Tax Director** plays a key leadership role in providing advanced technical expertise and strategic guidance on complex tax matters, regulatory developments, quality standards, and risk management initiatives. This role blends deep technical proficiency with client service responsibilities, maintaining a defined book of business while advising on complex tax issues across the organization. Working closely with the Tax Managing Director, NTO leadership, and engagement teams, the NTO Tax Director provides expertise on complex engagements, assisting in business development efforts, and mentorship of staff to maintain strong relationships and uphold the firm's culture. Dedication to consistent application of tax policy, resolves complex issues, and enhances overall quality and client outcomes through proactive planning strategies. The NTO Tax Director also plays a critical role in developing talent through technical training, fostering strong internal and client relationships, and reinforcing the firm's culture of excellence.

JOB DUTIES

QUALITY

- Assist with the development and implementation of firmwide tax policies, procedures, and best practices.
- Implement and uphold quality management initiatives and help ensure compliance with professional standards and regulatory requirements.
- Research, interpret, and communicate changes in tax laws, regulations, and industry guidance.
- Proactively communicate updates effectively to the tax practice.
- Provide advanced technical guidance and coaching to team.
- Lead the preparation, review and delivery of complex tax returns and advisory work, ensuring technical accuracy.
- Participate in internal inspections or quality reviews as assigned.
- Demonstrate timeliness and compliance with firm policies on financial matters: billing, accounts receivable, budgets, time reporting, engagement, and profitability and hold the team accountable to these standards.

CLIENT EXPERIENCE

- Serve as the primary contact for a portfolio appropriately sized for an NTO role of key clients, managing communication and expectations.
- Support client relationship-building initiatives through regular check-ins and value-add touchpoints to maintain a high level of client retention.
- Assist in onboarding new clients and defining engagement scope and deliverables.
- Operate with a client-first mentality to exceed client expectations and generate referrals.
- Deliver proactive tax planning advice aligned with client goals and risk profiles.
- Monitor deadlines and keep clients informed of engagement progress and key milestone dates.
- Address client questions and concerns promptly and escalate complex matters to the Managing Director when needed.

- Collaborate with client accounting, audit, advisory, and other teams to deliver integrated service.

PRODUCTION

- Provide technical consultation and support to engagement teams and firm leadership
- Collaborate with tax practice leader on risk management and process improvement initiatives.
- Identify operational challenges and suggest process improvements.
- Develop and implement engagement budgets, workplans, pricing structures and assist with resource allocation.
- Ensure team compliance with firm processes and use of technology tools and support implementation of new software, automation tools, workflow efficiency and consistency.
- Lead regular production meetings and manage workload distribution to leverage work appropriately, monitor engagement progress and resolve bottlenecks.

GROWTH & BRAND

- Develop and execute a personal brand strategy to get NTO information out to clients and potential clients.
- Support business development initiatives through technical expertise, thought leadership, and client-facing consultation.
- Develop and deliver technical tax training programs and continuing education content.
- Model a growth mindset by providing referrals to other Creative Planning services.
- Represent Creative Planning at community and industry events.
- Maintain a professional network with center of influence relationships, actively seeking, making, and exchanging referrals.
- Collaborate with others on content creation (e.g., articles, webinars) that enhance the firm's reputation.

CULTURE

- Model Creative Planning values.
- Provide and ensure open communication with all team members to promote a positive learning environment that focuses on trust, transparency, and accountability.
- Lead with a disposition of optimism and encouragement by being a role model and mentor team members.
- Achieve goals and help team members achieve their goals through training, coaching and development.
- Foster a supportive, respectful, and collaborative team environment and atmosphere that attracts and retains top talent.
- Provide clear, timely, and respectful feedback to team members at all levels.
- Drive purpose, connection, and meaning in the work while managing the team's work-life harmony.

REQUIRED EXPERIENCE / QUALIFICATIONS

- 10+ years of Tax experience including a strong track record of technical tax research
- Strong knowledge of federal and state tax laws and regulations
- Active CPA Certification
- Demonstrated expertise in complex tax compliance, planning, and advisory
- Bachelor's degree in accounting or related degree

TECHNICAL SKILLS

- Ability to interpret complex technical guidance and communicate practical application to engagement teams.
- Experience supporting quality management and compliance initiatives preferred.
- History of signing income tax returns of complexity while meeting quality standards.
- Strong technical knowledge of complex tax matters, including understanding and application of IRS and State tax codes.
- Proficient in Microsoft Office Suite.
- Familiarity with tax software, project management tools, and emerging technologies
- Excellent analytical skills and problem-solving abilities.
- Proven experience in leadership, team building, and communication skills.

Salary Range: \$200,000 - \$300,000

Creative Planning, LLC is an independent wealth management firm, whose affiliates also provide business consulting, tax, financial, and other professional services to clients. Creative Planning and its affiliates lease employees and other resources to BerganKDV, an independent, separately governed, and licensed CPA firm, in support of audit and attest services BerganKDV provides to its clients.