BBD, LLP
Tax Manager- Investment Management Group

At a time when many public accounting firms are downsizing, we offer a great opportunity to join a unique, dynamic and growing firm! Apply at bbdcpa.com/careers/experienced-professionals.

BBD is the boutique audit and tax solution for the investment management industry. We provide a complete, customized suite of audit and tax solutions for registered and private funds, investment advisors, broker-dealers and industry service providers.

Our values drive everything we do at BBD and differentiate us in the commoditized world of audit and tax services. BBD's professionals are **passionate** about the investment management industry and the audit and tax issues important to investment companies; **authentic** in our relationships and communication; and **collaborative** in navigating our clients' challenges. Our commitment to living these BBD core values enables us to deliver an **exceptional** client experience. We're setting the **PACE** in the industry for client experience quality.

At BBD, we pride ourselves on the warmth of our firm's culture, and the firm was recognized by the *Philadelphia Business Journal* as a Best Place to Work in 2017, 2018 and 2019. Our culture and work environment are very positive and stand in marked contrast to the "churn and burn" atmosphere common at many public accounting firms. We take care of our people, and, in turn, our people take care of our clients.

As a **Tax Manager** at BBD, LLP, you will help manage the delivery of all tax services for both registered and unregistered funds, including open-end mutual funds; exchange-traded funds; closed-end funds; interval funds; hedge funds; offshore funds; collective investment trusts; and private equity funds. You also will help manage the delivery of tax services for investment advisors and broker-dealers.

Specific Responsibilities and Performance Expectations.

- Consult with clients on tax aspects on security transactions
- Review prepared form 1120-RICs & 8613s, federal/state partnerships returns and Form K-1s
- Represent client for IRS or state tax audits
- Analyze tax ramifications of complex securities transaction
- Perform high level reviews of tax research, partnership work papers, allocations and tax returns
- Provide ongoing advice to clients to simplify complicated tax laws and improve the tax efficiency of their funds, including recommending tax strategies and tax solutions
- Develop and manage a high functioning team of tax professionals that work closely with and collaborate with other investment management professionals of the firm
- Develop and maintain new business and client relations, both with existing and new clients
- Manage, develop, train and mentor tax staff and assess their performance by providing timely feedback
- Some travel to client sites

Experience and Skills

- Bachelor's Degree or Master's degree in Accounting required
- CPA certification preferred
- 8 + years of relevant experience
- Experience in or understanding of the taxation of financial products and their advisors
- Proficiency in Microsoft Office
- Strong analytical and communication skills
- Superior dedication, integrity and professional bearing
- Dependability and strong work ethic

Compensation and Benefits

Our benefits include the following:

- Company-paid health insurance, life insurance and disability insurance
- Unlimited PTO
- Paid Parental Leave
- Flexible work arrangements
- Dress for your day
- Paid CPE, professional association dues, and professional licenses
- 401(k) plan with outstanding profit sharing