
Tax Associate

Income Tax Department • CPA Firm • Full-Time | Hybrid

Reports To: Senior Tax Associate or Tax Manager

POSITION SUMMARY

The Tax Associate is the foundation of our tax team, preparing accurate, compliant federal and state tax returns for individuals and businesses under the guidance of senior associates and managers. This role is where strong technical habits are built: precision, responsiveness, and genuine client care from the very first return.

The ideal candidate is an early-career professional, ideally a CPA candidate or Enrolled Agent (EA) in progress, with a sharp eye for detail, a hunger to learn, and high emotional and social intelligence. Beyond technical aptitude, we seek someone who is coachable, takes ownership of their work, and follows through without being chased.

WHAT THIS ROLE DOES

Prepare accurate, compliant federal and state tax returns across individual and business entity types under the direction of senior associates and managers, while building the technical foundation and client-service habits that define our firm.

YOUR ONE THING

“Wow the client with quick, clear, and concise communication - every time.”

This is not a metric. It is a standard. Every email, every call, every deliverable is an opportunity to demonstrate that our clients made the right choice.

CORE RESPONSIBILITIES

- Prepare individual and business tax returns accurately and completely for review by a senior associate or manager.
- Organize client documents and source data, and follow up promptly on missing or unclear information.
- Conduct basic tax research under guidance and document findings clearly.
- Respond to assigned client requests and questions in a timely, professional manner.
- Incorporate review feedback carefully and apply it to future work to reduce repeat errors.
- Maintain accurate, real-time client records and workflow status in firm platforms (HubSpot, Truss, etc.).
- Meet preparation deadlines and communicate proactively when timelines or workload are at risk.
- Support senior associates, managers, and partners with technical and administrative tasks as needed.

EXPECTATIONS

Every member of our team is expected to:

- Live and model our Core Values in every interaction: People First, Wow Every Client, Best Possible Outcome.
- Be coachable: seek feedback, apply it quickly, and treat every review as a chance to improve.
- Begin learning the Six Critical Questions of our firm playbook.
- Stay engaged and proactively raise questions and concerns early, before they become problems.
- Lead with an ownership mentality, taking initiative, following through, and owning your work.
- Participate in community engagement and service as a representative of the firm.
- Communicate well: clearly, promptly, and with appropriate context.
- Contribute to the team through a positive attitude, reliability, and example.

GOALS & OBJECTIVES

Horizon	Objectives
Daily	6+ billable hours/day • Respond to assigned communications within 24 hrs • Submit clean, review-ready returns • Apply prior review feedback • Keep HubSpot records accurate and current
Short-Term	Build proficiency in individual return preparation • Reduce review notes and rework over time • Take ownership of a recurring set of clients or return types • Begin preparing straightforward business returns
Long-Term	Prepare individual and business returns with limited review • Pursue and progress toward CPA or EA licensure • Begin identifying tax-saving opportunities during preparation • Develop toward the Senior Tax Associate role

QUALIFICATIONS

- Bachelor's degree in Accounting, Finance, or a related field (required).
- CPA candidate or Enrolled Agent (EA) in progress strongly preferred; eligibility to sit for the CPA exam a plus.
- 0-2 years of experience preparing individual or business tax returns, including internships.
- Working knowledge of federal and state tax concepts and a willingness to deepen it quickly.
- Strong attention to detail, organization, and follow-through.
- Clear written and verbal communication; able to ask good questions and explain status simply.
- High emotional and social intelligence: coachable, self-aware, and collaborative.

- Comfort with technology; exposure to tax preparation and CRM software is a plus (e.g., Intuit ProConnect, HubSpot, Truss).

OUR CORE VALUES

People First

We treat every client with respect, clarity, and care, taking responsibility for those who trust us.

Wow Every Client

We deliver a world-class experience through preparation, responsiveness, and disciplined execution, every step, every time.

Best Possible Outcome

We apply deep knowledge and sound judgment to advocate relentlessly in pursuit of the best possible tax outcome under the law.

These values guide every action and decision at our firm. They are not aspirational posters; they are behavioral standards lived daily by every member of our team.

GROWTH & ADVANCEMENT

This role is designed as a development pathway. High performers who demonstrate technical mastery, leadership, and client excellence will be considered for advancement into Senior Tax Associate and Manager-track roles. We invest in people who invest in themselves and in our clients.

WHY FIVE STONE

Five Stone Tax Advisers is an exceptional place to grow your career. We pride ourselves on a culture that prioritizes purpose, flexibility, and professional development.

- **Purpose Beyond Profits.** We donate 33% of our annual profits to local and international charities, offer five company-paid volunteer days each year, and lead regular donation drives that support the greater Austin area.
- **Flexibility and Work-Life Balance.** To prevent industry burnout, we offer remote and hybrid work options, flexible scheduling, and a generous PTO policy that lets you rest and unplug.
- **Financial Security and Career Growth.** We invest in our team through competitive salaries, 401(k) matching, and performance bonuses, and we fully fund CPA and EA certifications, continuing education (CPE) credits, and professional membership fees.
- **Holistic Health and Family Care.** Our benefits include comprehensive health, dental, and vision insurance with HSA options, paid parental leave, gym membership reimbursements, and 100% company-paid life and disability insurance.
- **Strong Team of Professionals.** You will work alongside an elite team of more than 30 specialized CPAs and tax attorneys in a collaborative environment where your contributions directly impact the world for the better.