FiveStone | TAX ADVISERS

Tax Partner

Income Tax Department • CPA Firm • Full-Time | Hybrid
Reports To: Managing Partner / CEO

POSITION SUMMARY

The Tax Partner sets the technical and strategic direction for a practice area, owns a book of business, and carries final authority on the firm's most complex planning and compliance engagements. This role is accountable for client outcomes, the financial performance of the practice, and the growth of the firm through new business and lasting relationships.

The ideal candidate is a licensed CPA with a distinguished record of technical leadership, business development, and people development. Beyond mastery of the code, we seek a builder: someone who wins and retains clients, mentors managers into leaders, and shapes the culture and standards of the firm.

WHAT THIS ROLE DOES

Lead a practice area and a book of business; provide the firm's highest level of tax strategy and advisory, drive new business and client retention, develop managers into the next generation of leaders, and help steer firm strategy, standards, and growth.

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

- Serve as the final technical authority and signatory on the firm's most complex individual, business, and fiduciary engagements.
- Own and grow a book of business, leading client retention, expansion, and the relationship at the executive level.
- Drive business development, including referral networks, prospecting, proposals, and community presence.
- Provide high-level tax strategy and advisory for the firm's most significant clients and engagements.
- Develop and mentor managers, building succession depth and a pipeline of future firm leaders.
- Own the financial performance of the practice, including revenue, realization, and profitability targets.
- Help shape firm strategy, technical standards, risk management, and quality control.
- Represent the firm externally and uphold its reputation, values, and professional standards.

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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.
- Steward the firm's reputation, culture, and long-term success as an owner.
- Build leaders, developing the managers and teams who carry the firm forward.
- Clearly understand and operate within the Six Critical Questions of our firm playbook.
- Remain engaged and proactively communicate concerns across the twelve key practice areas.
- Lead with ownership mentality, setting direction, following through, and holding the practice accountable.
- Participate in community engagement and service as a representative and ambassador of the firm.
- Communicate well: clearly, promptly, and with appropriate context.

GOALS & OBJECTIVES

Horizon	Objectives
Daily	Lead client relationships and high-value advisory conversations • Remove obstacles for managers and teams • Maintain visibility into engagement risk and quality • Model responsiveness and ownership in every client interaction
Short-Term	Grow and retain a defined book of business • Convert new client opportunities and referrals • Mentor managers toward independent leadership • Strengthen the practice's realization and profitability
Long-Term	Expand the practice and the firm's market presence • Build a durable referral and business-development engine • Develop a successor and leadership bench • Shape firm strategy, standards, and culture as an owner

QUALIFICATIONS

- CPA license in good standing (required); EA additionally where applicable.
- Bachelor's degree in Accounting or Finance; Master's in Taxation strongly preferred.
- 10+ years of progressive tax experience, including significant review and engagement leadership.
- Demonstrated business development and client relationship ownership; a portable or proven book of business preferred.
- Prior management of teams, with a track record of developing managers and senior staff.

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- Authoritative command of federal and state tax law across complex individual and entity matters.
- Exceptional communication, executive presence, and judgment in high-stakes situations.
- High emotional and social intelligence: a builder of trust, teams, and lasting client relationships.
- Proficiency with tax preparation and CRM software (e.g., Intuit ProConnect, HubSpot, Truss).

OUR CORE VALUES

People First	Wow Every Client	Best Possible Outcome
We treat every client with respect, clarity, and care, taking responsibility for those who trust us.	We deliver a world-class experience through preparation, responsiveness, and disciplined execution, every step, every time.	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. Partners who demonstrate technical mastery, leadership, and client excellence will be considered for advancement into equity participation and senior firm leadership. 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.