



White Oak Partners is a growing multifamily real estate investment firm with over \$2.7B AUM. We look for performance-driven individuals with passion and focus who thrive in an environment of collaboration, open communication, and transparency. We are looking for a Manager to join our growing Accounting team.

This position is responsible for the overall management of tax at White Oak Partners, with specific focus on corporate tax and the impact to Shareholders. This position will also assist the Fund Administration team with Fund level tax preparation.

#### **Essential Duties**

- Oversight of annual tax calendar to ensure all deadlines are being met, which includes close coordination with our third-party tax preparers to ensure their progress is in line with the deadlines and WOP is receiving the proper deliverables to support our internal tax planning
- Participate in overall tax strategy discussions and planning, including providing feedback on our third-party providers
- Prepare and ensure timely filing of corporate and Fund (as applicable) tax provisions schedules, returns, payments, reports and maintain White Oak's tax database
- Involvement in special projects and performance of complex ad-hoc analyses deemed necessary by various shareholders and senior management, including researching complex tax issues
- Participate in strategic discussions concerning the tax impact of fund structures
- Prepare quarterly and annual tax estimates, working closely with third party tax preparers to ensure completeness of estimates
- Remain current with new tax legislation and trends
- Research tax issues and prepare tax computation summaries
- Stay abreast of ownership structure changes that may have a tax impact for the firm
- Coordinate with shareholders' tax preparers on state and federal filing inquiries
- Submit and confirm receipt of all annual state tax return payments
- Review and communicate to shareholders their allocation of state tax payments
- Establish strong cross-departmental working relationships to ensure tax risks are identified and managed

#### **Education and Experience Requirements**

The ideal candidate for this position will thrive in a highly entrepreneurial, fast-moving environment. This self-starter should be an enthusiastic team player, offer a bias toward continuous improvement, and an ability to manage multiple priorities.

- Bachelor's degree with accounting major required
- CPA designation or advanced degree required
- Minimum of 5-8 years of tax experience
- Advanced skills and strong technical background possessing a high level of financial and analytical skills related to tax matters as well as statutory reporting
- Ability to think beyond the financial implications to business decisions and to consider overall business strategies and key operational issues

*Note: Nothing in this job description restricts the right for management to assign or reassign duties and responsibilities to this job at any time.*

- Strong understanding of, and ability to interpret various legal documents (i.e. Partnership Agreements, loan documents, etc.)
- Ability to set short- and long-term goals and monitor/ provide performance feedback to contribute to the growth and development of staff members
- Ability to manage conflict
- Ability to work effectively with third parties
- Must be able to function successfully in a collaborative team environment
- Strong attention to detail and analytical ability to solve various problems
- Client-focused approach to work
- Ability to work in a fast-paced environment and manage well through ambiguity and complexity
- Demonstrated ability to plan and organize on a tactical level and operate within established deadlines
- Self-motivated individual with high degree of responsibility, sense of urgency, accountability
- Strong oral and written communication skills
- Sensitivity and discretion pertaining to confidential information.