

Lawley

INSURANCE | EMPLOYEE BENEFITS

Manager of Taxation and Reporting

These are the *fundamental* components of the job:

- Oversee and manage all tax compliance and related accounting functions
- Work collaboratively with Co-CFO's and external CPA firm to prepare/review year-end schedules and coordinate the delivery of tax returns, including payments and quarterly estimated tax payments.
- Complete and file Form 720 Quarterly Federal Excise Tax Return and manage excise tax payments
- Maintain the fixed asset schedule, ensuring proper classification, disposals, and transfers
- Coordinate the 401(k) annual audits and prepare and file the annual Form 5500, partner monthly PTET calculations, quarterly distributions and income projections
- Responsible for certain general ledger accounting functions including daily, weekly, monthly accounting tasks and activities (i.e., profit distributions, intercompany chargebacks, benefits; annually prepares partner benefit statements and maintains monthly journal entry.)
- Prepare, review and electronically distribute all monthly office financial statements
- Support Controller and Manager of FP&A in formulation of internal controls and policies, special projects, and year-end audit preparation. Assigns tasks for project planning and completion
- Maintain monthly, quarterly and yearly audit procedures on commissions using Qlikview to ensure accurate commission payment to partners and producers.
- Analyze, design and implement logical data models within Qlikview that tie back to financial information (i.e., production).
- Create, organize and maintain various financial reports in EPIC (Agency Management System) Crystal Reports, Qlikview, Excel and Access.

Other functions of the job:

- Collaborates with various departments across the footprint
- Expand and grow in your role when supporting miscellaneous duties as requested

Skills / traits that we value for this role:

- College degree of 4-6 years (BS, MBA); CPA preferred
- Minimum of 3-5 years in a similar or related position, some public accounting experience preferred
- In-depth knowledge of federal, state and local tax regulations and compliance requirements
- Strong background in the use of technology: Advanced Excel is a must!
- Experience with working with Salesforce, Epic, Crystal and/or Qlikview preferred
- Ability to work well independently and on a team



'Lawley provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to age, race, creed, color, religion, sex, sexual orientation, national origin, citizenship, immigration status, gender identity or expression, military status, familial status, marital status, disability or genetics.'

- Incredible attention to detail and organizational skills
- Ability to learn quickly, expand tasks to create meaning, and develop knowledge through experience
- Positive attitude, even in a fast-paced environment
- A passion to make customers and coworkers feel important and valued
- Capability to work quickly and efficiently
- Dependability and ability to exercise confidentiality
- Precise communication skills, even under time constraints

A bit about Lawley!

- We are not a call center environment
- We achieve success by building genuine relationships together, with our teams and clients
- We are a family owned insurance broker (nearly 70 years!)
- We are deeply committed to the communities we serve and love to get involved
- We work hard and play hard!!!

Why Lawley?

- Competitive salary and referral bonuses!
- Expansive Benefits (Medical, Dental, Vision—and SO many more)
- 3 weeks of PTO (prorated based on start date) AND a generous holiday schedule – available 1st day!
- Company 401K contribution received starting Day 1 (for participants 21+ years old)
- Educational support, career development, and growth opportunities
- Job Security (we've never had a lay-off, even during the pandemic)
- Flexibility, including hybrid schedules! Business hours 8am-4:30pm
- Comfortable, family-oriented culture, with an emphasis on work life balance
- Unlimited Volunteer Time Off opportunities (so you can assist in serving our communities)
- Fulfilling opportunities that align with your career path and our business needs

The compensation range for this position takes many factors into consideration including but not limited to: years of experience/training, skill set, and licenses/designations. It is not typical for an individual to be hired near the top of the range for a position as circumstances and location can vary in every hiring situation. A reasonable estimate of the current range is \$84,613.20 to \$141,022.00.

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