

SENIOR LEADERSHIP

Tax Director Job Description



Renew Group



SENIOR LEADERSHIP

Tax Director

A senior leader responsible for client portfolio success and the provision of technical tax expertise, externally and internally.

3 Leadership pillars	7+ Core qualifications	12 Key success metrics
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OVERVIEW

Position Purpose

The Tax Director is a senior leader within the firm responsible for the success of a portfolio of clients, and the provision of technical tax expertise externally and internally.

Success is measured by client retention and growth, profitability, and the ability for the firm to leverage tax expertise as a core differentiator.

ROLE SCOPE

Key Responsibilities

Client Leadership

Serve as primary relationship owner for assigned portfolio of client

Develop deep understanding of each client's goals, challenges, and long-term plans

Lead proactive planning and advisory conversations throughout the year

Anticipate client needs before they become problems

Ensure exceptional service, communication, and value

Identify opportunities to improve outcomes and strengthen relationships

Support client retention and long-term portfolio growth

Business Leadership

Own the profitability of the assigned client portfolio

Support pricing, scope management, and client value discussions

Identify opportunities to deliver additional value to clients

Contribute to strategic initiatives and firm growth objectives

Support implementation of new services and operational improvements

Actively contribute to building a stronger, more valuable firm

Technical Leadership

Provide guidance on complex tax and business matters

Review significant client deliverables and provide technical oversight

Serve as a technical resource for team members

Maintain current knowledge of tax legislation and industry developments

Support development of technical capability across the team

PERFORMANCE

Key Success Measures

Clients

- Client retention
- Client satisfaction
- Growth of client relationships
- Delivery of proactive advice and planning

Financial

- Portfolio profitability
- Realization of target AHCR
- Revenue growth within assigned accounts
- Effective scope management

Leadership

- Contribution to firm culture
- Participation in strategic initiatives
- Demonstration of firm values
- Positive influence on others' performance

Reporting Structure

REPORTS TO

Partner / Director / Owner

DIRECT REPORTS

Senior Accountants and Associates

 MANDATORY CREDENTIAL

CPA Designation Required

Qualifications & Experience

- ✓ CPA designation
- ✓ Strong tax and accounting background
- ✓ Proven experience leading people and managing client relationships
- ✓ Strong communication, coaching, and leadership skills
- ✓ Ability to think commercially and strategically
- ✓ Strong organizational and project management skills
- ✓ Commitment to continuous learning and professional growth

