Seeba Accounting, Inc.
Certified Public Accountant

San Jose, California
http://www.seebaassociates.com/

TAX CPA – PRINCIPAL
OPPORTUNITY PROFILE

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OVERVIEW

Located in the heart of California's Silicon Valley (San Jose), Seeba & Associates is seeking a Tax CPA and future principal to join their firm. S&A has become well known to entrepreneurial small businesses, estate planning professionals, and to the Bay Area Christian community.

HISTORY

Its original founders, Dave Hanush & Dave Seeba established a strong reputation for the Firm in 1980 with their backgrounds in tax, auditing, and the management of nonprofit organizations. Dave Hanush, CPA & former CFO of a missionary organization, retired after 17 years. Since then, Dave Seeba, CPA has run the Firm with the help of talented associates. 20 years ago, Steve Boersma PhD joined the Firm with the desire to consult with churches and ministries, and help with ministers' taxes. Steve retired earlier this year. Dave Seeba has developed expertise in estate planning, use of Charitable Remainder Trusts, income tax planning, as well as assisting various types of foundations. Following the Dot Com Bust, Mark Ledwith CPA merged in his tax practice and was with S&A for 14 years until his retirement. Currently, there are four Principals with one retiring in the next two years.

THE FIRM'S COMMITMENT

Seeba & Associates believes in the value of relationships and believes that their success is a result of helping clients to achieve their own success. S&A is committed to providing close, personal attention to their clients. They take pride in giving their clients the assurance and added value that comes from years of advanced training, technical experience and financial acumen.

ORGANIZATIONAL CULTURE

The Staff at Seeba & Associates conducts themselves with integrity, a sense of teamwork, and a deep commitment to their clients. They value professionalism, and believe it is critical to demonstrate integrity in all situations.

People work for two reasons, significant compensation or significant meaning. At S&A employees get to combine these two goals, satisfying their desire for meaningful work while utilizing their tax and accounting skills. That's why many staff members stay with the Firm for decades and leave only to retire. The Staff recognizes that Seeba & Associates is an

entrepreneurial, inspiring and unique workplace. They are a hard-working, close-knit group who is highly motivated, carrying out their work with excellence. The staff also recognizes each team member plays a part in helping individual clients reach their goals and helping faith- based organizations further their mission and address their need for financial accountability.

Staff members are encouraged by Dave Seeba and other Principals of the Firm, to provide excellence and creativity within the context of their accounting/tax processes and procedures. Dave is described by the team as collaborative, strongly goal and metrics-focused, and an effective vision caster with the desire to release competent people to do their jobs. Dave sincerely cares about the Staff as well as the S&A clients.

CURRENT LEADERSHIP

DAVID A. SEEBA is a Certified Public Accountant having significant experience with individuals, small businesses, and charitable organizations. Dave received his CPA certificate in 1975 and continued his education through Golden Gate University. In 1980, Dave began the Firm with a partner. Dave was also a founder of the Planned Giving Foundation, which provided estate planning and deferred giving consultation to donors of Bay Area charities from 1991 through 1997. He currently serves on the board of a number of nonprofit foundations as well as helping his clients with their tax and accounting needs.

THARAN J. LANIER, CPA. Terry is a graduate of Santa Clara University. He received his MBA from Santa Clara in 1974 and started his own accounting practice in 1976. As the founder and a partner of that firm, Terry specialized in individual and business tax, in addition to running the firm's audit department focused on local nonprofits and churches. Terry left that firm and joined Seeba & Associates in 2013. Terry has taught accounting and business management courses at CA community colleges, Santa Clara Univ, & for UC Santa Cruz.

ANNA M. PHILIP, CPA. She received her CPA certification in 2005. Anna has a degree in Commerce and worked as a school accountant, tax associate, and auditor prior to joining the Firm as an auditor in 2002. Anna currently focuses on tax returns for individuals, nonprofits, corporations, partnerships, and trusts. Anna also manages a group providing private office services to key client families. She also continues to provide compilations for her clients, in addition to consulting with various nonprofits.

GRANT DOW, CPA, MST, joined Seeba & Associates in 2016 having 20 years of experience in audit and tax. He now heads the Audit/Review Team at the Firm. He had nine years working in private industry before transitioning over to public accounting in 2004. Grant spent eight years focused on providing audit & review services. Since 2011, he focused on assisting businesses and individuals with their tax-related issues. Grant received his BA in Economics from UC Santa

Cruz in 1993, his CPA certification in 2007, and his MS in Taxation from San Jose State University in 2013.

REVENUE SUMMARY

17% Audits/Reviews/Compilations (nonprofits)
22% Accounting and Bookkeeping (including Private Family Office bookkeeping)
11% Accounting and Management Consultation (nonprofit & for-profit entities)
11% Tax Consultation (for profit entities)
20% Tax Preparation (Businesses, Trusts, & Estates)
19% Tax Preparation (Individuals)
100%

WHAT TEAM MEMBERS SAY ABOUT SEEBA & ASSOCIATES AND A NEW LEADER

"…the candidate will likely wear several hats (Tax and Consulting); it would be great if they have experience with nonprofit and faith-based organizations…"

"…we are about teamwork, common goals, increasing efficiency, and doing our part to help the client move their mission forward…"

"…to assume Dave's responsibilities, the successful person must be super-organized…"

"…the culture here is by far of most importance—we stress extremely high-quality work—no shoddy stuff goes out…"

"…to take on Dave's clients, they will need to be top notch; Dave has some heavy-hitter clients…"

"…Dave has an ability to explain the complex in a simplified manner that both a staff member and client can understand; he will either know or know how to find a solution to a difficult issue--our new leader needs this ability and motivation..."

"…We have clear operating procedures; the most successful candidate will adhere to them—it makes it more efficient and effective for all…"

"…the culture—set by Dave—is very gracious with room to learn from your mistakes; he does not micromanage…"

"…a part of my job that I love is being able to genuinely care for both staff and clients; many of our clients have been with us for decades, so we have been through life together…"

“…it is a fabulous team, and this is a great place to apply top accounting skills to support ministries…I am amazingly blessed to combine my CPA skills with my faith in order to serve…” "...while strong accounting skills are vital, it would be more even more important to find a candidate with leadership, operations and developed emotional intelligence..."

“…the person should be neither aggressive or timid—must have the ability to play to strengths, good timing, and a sense of tact—a willingness to volley ideas back and forth with conviction to stand on their idea but with the courage and maturity to defer to others as well …”

“…I have never worked in a firm that is so pleasant, even during the stressful tax season—there is no drama, people are polite, civil…”

THE POSITION

Overview

S&A is seeking a CPA licensed for tax to join our firm. Must be interested in and experienced with complex individual tax returns and have the ability to review the work of others within the Firm. Past experience in tax work for nonprofits, trusts, LLCs and partnerships is desirable. Requires a natural aptitude for detail, good organizational skills, and the tenacity needed to ensure both their work and the work of those they review is complete and accurate. Must have the requisite personnel experience and management skills needed to effectively lead a team of professionals. Our Firm’s audit and review work is exclusively with Christian church and faith-based nonprofits. Many of our tax clients are faith-based nonprofits and individuals who fund these types of nonprofits. Some clients are deferred giving entities designed to leave legacy gifts to these nonprofits. The candidate should have good tax planning skills as well as an interest in working with and serving this particular market niche. This supervisory Tax CPA role is a senior position within the Firm, anticipated to become a Principal after a short qualifying period, and hopefully to become the Managing Principal within a few years.

Duties & Responsibilities

- Interviewing individual tax clients to obtain tax preparation information.
- Performing complex tax preparation for individuals, businesses, trusts, and nonprofits.
- Reviewing the tax preparation done by others in the Firm.
- Providing tax consultation to our various tax clients.
- Researching tax issues to properly identify and apply tax principles to unusual situations.
- Preparing tax projections for clients and assisting others in the Firm with complex tax planning.
- Providing oversight of many of the Firm’s staff. Must have the requisite personnel experience and management skills needed to effectively lead a team of professionals

- Generating new business and sifting through potential opportunities to find those which fit with the focus and capacity of the Firm.
- Nurturing relationships with potential clients that will help build the Firm.

Personal and Professional Qualifications

- Ethical – will always seek to do the right thing, clearly understanding what that is.
- Organized in manner of work and in how their work product interfaces with others in the Firm.
- High initiative, self-starter, diligent in pursuing work to completion, always learning.
- Goal oriented – likes to produce tangible results and exceed expectations.
- Understands and utilizes metrics to measure and improve performance.
- Excellent communication skills, both verbal and written. Establishes rapport with clients easily and develops good working relationships with both clients and staff.
- Maintains contacts with peers and networks and cultivates referrals.
- Ability to represent the Firm with senior leaders of local businesses and nonprofits.
- Establishes and maintains networks of expertise outside the Firm to make a full range of services available to clients.
- Able to develop and maintain the Firm's staff, participate in recruitment, orientation, and training, with a good sense of what skills are needed to be successful in the Firm.
- Have an interest in serving Christian churches and ministries. Although the Firm has many types of clients, this has grown to become a significant niche market for us. So there must be an interest in developing expertise in tax, legal and employment issues relevant to Christian organizations.
- Able to read and accurately interpret technical literature and legal documents.
- Able to analyze tax notices, draft effective responses, and represent clients on federal, state and local audits.
- Able to address complaints and resolve problems.
- Able to interact effectively with all levels of employees within the Firm, to include peers, co-workers and supervisors.
- Able to provide and accept constructive criticism in a respectful, open and interactive manner.
- Willingness to develop competency in preparing charitable remainder unitrust (CRU) returns and become familiar with key CRU document provisions and opportunities.
- Willingness to develop competency in preparing trust and estate returns and becoming familiar with key estate document provisions and planning opportunities.
- Demonstrated leadership and management skills in working with in-house tax professionals.
- Has a commitment to effective standard operating procedures within the Firm and will be diligent in providing an example of following standard operating procedures
- Driven to improve processes and utilize technology to lower cost and improve results.

- Has an interest in new technology trends, while being careful to champion those which will serve our clients effectively and move the Firm forward in a manner consistent with its service goals.

Minimum Requirements

- B.A. or B.S. in Accounting. M.A. in Tax is desirable. GPA 3.25 or above.
- Current CPA license (for tax at least). Being licensed for audit is a plus, but not required.
- Received A or A- grade in both semesters of Intermediate Accounting.
- Minimum of six years of significant tax experience in public accounting, including demonstrated interview skills in working with tax clients. Two years of demonstrated competence in reviewing tax returns. Ideally, this should be in individual, corporate, partnership & LLC's, and trust taxes.
- Minimum of two years' experience supervising or managing the work of others, either in public accounting or private industry.
- The candidate must currently live within 35 miles of San Jose or be planning on moving that close from elsewhere in the Bay Area.
- A candidate searching for a long-term ownership position, after 1-2 years employment period and agreement by both parties to proceed with buy-in.
- Willing to sign a non-compete agreement, which establishes a financial commitment for anyone leaving the Firm, in regards to any clients they might take from S&A.

POTENTIAL—the future at Seeba & Associates

The Firm is looking to provide a long-term ownership position, after a 1-2 year employee period and agreement by both sides to move forward with buy-in at the end of that period. It's anticipated that buy-in would be at a discounted price and paid for via a 5-year schedule of payments from earnings (rather than using outside, borrowed money).

The Candidate should be willing to be compensated based upon production, after the 1-2 year employee period, using the formula currently in use by other S&A Principals.

Given the retirement of one of the Principals in 2019, the retirement of another a couple of years after that, and the reduced workload of the current Managing Principal in three years, the Candidate should anticipate being involved in the management of the Firm along with 2-3 others within three years.

Anticipated Path for Future Managing Principal of S&A

Sept/Oct 2020
Hire new potential Principal

Oct 2020-Sept 2021
Work on tax returns, interview some clients during Tax Season, learn about CRUs and prepare 20 during tax season, learn about trusts & estates and prepare some 1041s & 706s, learn about nonprofit consulting and do some exemption applications, tax/legal compliance reviews, and real property exemptions.

Oct 2021
Determine which clients will become yours. Sign documents to purchase those clients (over 60 months) and to determine your compensation in like manner of other S&A Principals.

Jan-May 2022
Do tax season handling your clients.

June-Dec 2022
Learn personnel, compensation, and managements aspects of S&A

Jan 2023
Assume Managing Principal role at S&A, including personnel management and financial management of S&A.

THE SEARCH PROCESS

If you know someone who has an interest and meets most of the experience and motivational requirements described in this profile, please feel free to suggest that person for consideration and/or forward this information.

Please request they forward their résumé to the contact below. Suggested names will be treated discreetly and candidates should be assured that their inquiries will be treated with the utmost confidentiality.

Our client is an equal opportunity employer and does not discriminate.

Ardent fully respects the need for confidentiality of information supplied by interested parties and assures them that their specific backgrounds and interests will not be discussed with anyone, including Seeba & Associates, without their prior consent, nor will reference contacts be made until mutual interest has been established.

Ardent Search Company (an affiliate of The Dingman Company, Inc.) is a retained executive search firm devoted exclusively to serving our clients in matters of executive selection. We are a generalist firm that has served business and non-profits worldwide since 1979.

For further information on this position, please contact

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