



JR MARTIN_{cpa}

BUILDING BETTER BUSINESSES

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OPPORTUNITY PROFILE

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Director of Tax

Presented by



PROACTIVE TAX STRATEGY & ADVISORY FOR: LONG TERM BUSINESS SUCCESS

J.R. Martin & Associates helps business owners build strong, sustainable companies through expert accounting, tax, and strategic advisory services that reduce risk, provide clarity, and support long-term success.

Mission

To help business owners save time and money, reduce uncertainty, and build lasting success through expert accounting, tax strategy, and personalized advisory services.

Firm Snapshot

- **Location:** Redding, California
- **Service Area:** Northern California
- **Firm Type:** Full-service public accounting and advisory firm
- **Clients:** Closely held businesses, entrepreneurs, and individuals
- **Culture:** Relationship-driven, growth-oriented, values-based

Vision

To be the most trusted accounting and advisory partner for small and closely held businesses in Northern California.

Core Values

- **Excellence** - A relentless commitment to getting it right.
- **Teamwork** - Valuing, encouraging, and committing to one another.
- **Innovation** - Leading the necessary change.
- **Integrity** - Honesty, positivity, and trust as non-negotiables.
- **Tenacity** - Taking ownership and delivering results, no matter the challenge.

OPPORTUNITY OVERVIEW

J.R. Martin & Associates, a respected and growing CPA firm serving closely held businesses primarily throughout Northern California, is seeking a **Director of Tax** to join its leadership team. This is a highly visible and strategic role for a seasoned tax professional who combines deep technical expertise with a genuine desire to develop people, improve systems, and help business owners thrive.

The Director of Tax will serve as the firm's senior tax authority—providing final review and sign-off on complex tax engagements, leading advanced tax strategy, and building a technically excellent, client-centered tax team. This leader will play a central role in shaping the firm's future by setting standards, mentoring others, and creating scalable systems that support sustainable growth.

J.R. Martin & Associates is known for its personal, relational approach to client service. The ideal candidate will share the firm's commitment to integrity, excellence, and partnership—someone who leads with kindness, inspires confidence, and is motivated by a deeper sense of purpose that shapes how they serve others.



J.R. MARTIN & ASSOCIATES



ABOUT US

J.R. Martin & Associates helps business owners build strong, sustainable companies through expert accounting, tax, and strategic advisory services that reduce risk, provide clarity, and support long-term success.

The firm is intentionally structured around proactive, year-round engagement rather than transactional, once-a-year compliance work. Clients receive frequent oversight and ongoing monitoring of their financial health, allowing issues to be anticipated and addressed well before they become problems. J.R. Martin & Associates partners closely with clients to understand their businesses and provide tailored guidance that goes well beyond tax preparation. This high-touch, advisory-driven model ensures clients are equipped to make informed, forward-looking decisions with confidence.

Clients are viewed as long-term partners, and the firm places a strong emphasis on education, strategic thinking, and consistent support—walking alongside business owners as trusted advisors as they grow and steward their companies.

JULI MARTIN, CPA, CTS



J.R. Martin & Associates is led by Juli Martin, CPA, CTS, President, whose leadership is shaped by her faith, a deep commitment to stewardship, and a genuine desire for maximum impact. She prioritizes ethical decision-making and care for people, seeking long-term benefit for both clients and team members.

A CPA since 2001, Juli brings more than two decades of experience in public accounting and financial leadership. She previously served as Controller at Simpson University and has led J.R. Martin & Associates as CEO/CFO since 2009. She holds the Certified Tax Strategist (CTS) designation and is known for delivering advanced tax strategies that help small business owners grow wisely and sustainably.

Juli views work as meaningful and believes leaders are responsible for developing people, not just producing results. Candidates joining the firm will work alongside a leader who values excellence, learning, accountability, and purpose-driven service.

ORGANIZATIONAL CULTURE & LEADERSHIP

J.R. Martin & Associates is a firm where leaders are expected to create more leaders. The culture is collaborative, supportive, and performance-driven—focused on delivering excellent work while genuinely caring about people.

Team members are coached rather than merely corrected. Learning is continuous, questions are welcomed, and growth is intentional. The firm values humility, clarity, and kindness alongside technical excellence, believing that how work is done matters just as much as the results achieved. Leaders are expected to set a high bar while equipping others with the skills and confidence to meet it.

The Director of Tax will join a leadership team committed to developing people, improving systems, and serving clients with professionalism, integrity, and care.



WHAT TEAM MEMBERS SAY...

ABOUT J.R. MARTIN & ASSOCIATES AND THE NEW DIRECTOR OF TAX

- While many CPA firms are entrenched in traditional systems, J.R. Martin & Associates is innovative, forward-thinking, and “tip-of-the-spear” in addressing the evolving needs of business owners.
- J.R. Martin & Associates moves quickly to test well-reasoned ideas, balancing speed with sound judgment. Juli brings ideas forward with clarity and humility, while intentionally creating space for dialogue and adjustments as decisions are refined based on cost, impact, and results.
- The Director of Tax will be technically savvy, able to quickly get up to speed on J.R. Martin & Associates’ platforms and demonstrate a high level of project management.
- Juli, along with the broader leadership team, leads with grace and respect, balancing high expectations with thoughtfulness and care for people.
- The Director of Tax must be a capable trainer and encourager, invested in developing others.
- At times, our approach—such as our annual service package rather than once-a-year engagement—can be challenging to explain initially. Once clients embrace this model, the differentiation becomes clear and often results in meaningful cost savings.
- The firm is seeking a leader who brings discernment, curiosity, and a strong commitment to learning.
- The firm is highly systematized, with clearly defined processes and tracked workflows. The Director of Tax must be willing to learn J.R. Martin & Associates-specific processes and software.
- The firm actively embraces AI and emerging technologies to improve efficiency and insight.
- Precision is valued over speed, though both are essential. Mistakes are viewed as learning opportunities when accompanied by ownership and growth.
- There are no silos and no internal competition; instead, the team works collaboratively and “competes” together on behalf of our clients.
- We value knowing one another, while maintaining healthy professional boundaries.
- Work at J.R. Martin & Associates is intentionally structured for sustainability. The firm prioritizes efficiency, clear systems, and thoughtful planning over long hours, allowing the team to deliver high-quality work without relying on seasonal overtime.
- As a team, we are unified in anticipating issues before they arise. The Director of Tax will bring a strong understanding of business operations, a willingness to meet with both existing and prospective clients, and an eye for identifying new business opportunities.
- We are proactive rather than reactive, setting clients up for success throughout the year—not just at year-end.
- The firm is intentional about building a robust in-house training program; the model differs meaningfully from traditional CPA firms.
- This is a true “slingshot” opportunity, supported by intentional onboarding and ramped training, offering significant growth and long-term potential within a well-structured firm.
- We hold weekly meetings that incorporate both business discussions and activities designed to help the team get to know one another.

POSITION OVERVIEW

The Director of Tax is responsible for providing strategic, technical, and people leadership across the firm. This role holds firm-wide authority for tax quality, including final review and signing authority for tax returns, and serves as the firm's senior technical advisor for advanced planning, compliance, and representation matters. While some team members currently release returns independently, this role sets and maintains the firm's overall tax quality standards.

In addition to technical leadership, the Director of Tax plays a critical role in recruiting, mentoring, and developing a high-performing tax team—multiplying impact by building confidence, judgment, and technical depth throughout the organization.

POSITION SUMMARY

The Director of Tax acts as the firm's technical leader for tax quality, strategic advisor, and culture carrier as a member of the leadership team. The role requires exceptional technical expertise, sound judgment, and the ability to explain complex matters clearly, respectfully, and constructively.

Success in this role is measured not only by accuracy and outcomes, but also by the ability to elevate others, improve systems, and create scalable processes that support the firm's long-term growth.

PRIMARY RESPONSIBILITIES

Lead Firm-Wide Tax Quality and Technical Excellence

- **Collaborate** closely with the Director of Accounting on matters of accounting quality that impact tax accuracy, while maintaining clear ownership of accounting quality control within the accounting function.
- **Maintain**, monitor, and continuously improve firm-wide tax quality control processes to ensure accuracy, compliance, effectiveness, and efficiency across all tax engagements.
- **Serve** as the firm's final review and signing authority for tax engagements, establishing and maintaining firm-wide tax quality standards.
- **Advise** on advanced tax matters requiring senior-level judgment, including complex structuring, transactions, real estate, multi-state considerations, and long-range planning.
- **Interpret**, contextualize, and guide the firm's application of new and evolving tax laws, translating complex changes into clear, practical guidance for clients and the team.

PRIMARY RESPONSIBILITIES CONTINUED...

Train and Multiply Impact

- Recruit, mentor, and develop a technically strong, client-focused tax team.
- Design and lead technical training programs that build depth, judgment, and confidence at every level.
- Provide thoughtful, empowering review feedback that strengthens both work quality and professional growth.
- Foster a coaching culture where learning, accountability, and development are prioritized.

Strategically Advise Clients

- Lead complex tax planning engagements for closely held businesses and high-net-worth individuals, applying sound judgment across a wide range of planning considerations (e.g., ownership structures, transactions, succession, and long-term strategy).
- Provide strategic guidance focused on helping clients make well-informed decisions in complex situations, weighing tax implications alongside broader business, financial, and personal considerations.
- Serve as the primary point of contact for more complex client relationships, with responsibility for client retention, coordination of work across the team, and overall client experience. For less complex clients, act as the escalation point when senior-level judgment or involvement is required.

Shape the Firm's Future

- Partner with firm leadership to guide the growth and maturation of the tax department, including team capability, service complexity, systems leverage, and sustainable profitability.
- Lead process improvements, workflow design, tax technology decisions, and firm-wide technical training that strengthens capability, consistency, and leverage.
- Operate within and reinforce the firm's established service model and standards, contributing perspective as leadership involvement naturally expands over time.
- Develop systems designed for scalability, sustainability, and consistency.
- Contribute to technical content and internal thought leadership.

IDEAL QUALIFICATIONS

Education

- Active CPA license (required).

Experience & Expertise

- 10+ years of progressive experience in public accounting with advanced tax review and advisory responsibility.
- Demonstrated experience providing final sign-off on business entity and individual tax returns.
- Demonstrated depth of experience in federal and multi-state taxation, with the ability to navigate complexity and apply sound judgment across a wide range of scenarios.
- Experience navigating IRS and state matters as part of broader business and individual tax advisory work.
- Comfort working with cloud-based tax software, project management tools, and automation platforms. Current tools include UltraTax CS, Fixed Assets CS, Planner CS, Qount, QuickBooks Online, advanced Microsoft Excel, Adobe tools, and a variety of AI-enabled platforms used to support efficiency and insight.
Interest in learning and adopting new technologies is more important than prior experience with every platform.

Leadership & Personal Attributes

- Proven ability to train, mentor, and inspire others with clarity, professionalism, and kindness.
- Demonstrated ability to improve existing systems thoughtfully while also designing and building new systems where gaps exist.
- Strong judgment, analytical skills, and a strategic mindset.
- High integrity, collaborative spirit, and commitment to excellence, grounded in strong personal values.

The Search Process

If you or someone you know is interested and meets most of the qualifications outlined in this profile, please contact us or recommend them for consideration. Alternatively, you may forward this information to them.

Send your resume to the contact below.

Candidates can rest assured that their names will be handled discreetly, and their inquiries will be treated with the utmost confidentiality.

J.R. Martin & Associates is an equal opportunity employer and does not discriminate based on race, age, religion, gender, national origin, familial status, veteran status, or disability.

We understand and fully respect the need for confidentiality of information provided by interested parties. Be assured that backgrounds and interests will not be discussed with anyone, including our client, without prior consent. Additionally, reference contacts will not be made until mutual interest has been established.

Thank you,

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