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Accounting & Tax Manager Opportunity

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Presented by:



Finding Leaders. Advancing Legacies.

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.

Core Values

Excellence – *We are obsessed with getting it right.*

Teamwork – *We value, encourage & commit to each other.*

Innovation – *We lead the necessary change.*

Integrity – *We are passionate about honesty, positivity & trust.*

Tenacity – *We get results no matter the challenge.*

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

OPPORTUNITY OVERVIEW

J.R. Martin & Associates is seeking an experienced CPA to join the firm as an Accounting & Tax Manager. This highly visible role is ideal for a public accounting professional who combines strong accounting and tax expertise with sound judgment, exceptional client service, and a passion for developing others. The Accounting & Tax Manager will lead client engagements, review accounting and tax work, provide proactive planning and advisory services, mentor team members, and serve as a trusted advisor to closely held business clients. For professionals seeking to make a meaningful impact, this role offers the opportunity to help shape the continued growth of a respected advisory-first firm while building lasting client relationships, strengthening the team, and expanding the firm's advisory capabilities.

Rather than focusing primarily on annual compliance, the firm has intentionally built an advisory-first model centered on year-round client relationships.

J.R. Martin & Associates is a respected and growing accounting, tax, and advisory firm serving closely held businesses throughout Northern California. Rather than focusing primarily on annual compliance, the firm has intentionally built an advisory-first model centered on year-round client relationships, helping business owners reduce uncertainty, make informed decisions, and build stronger businesses. By combining technical excellence with practical business insight, the firm delivers personalized guidance that extends well beyond tax preparation.

J.R. MARTIN & ASSOCIATES



WHAT THE TEAM MEMBERS SAY ABOUT J.R. MARTIN & ASSOCIATES

- *I love our efficient model—we rarely work over 40 hours per week, even during tax season.*
- *We build year-round relationships with our clients, use technology to work more efficiently, and help business owners make better decisions—all while maintaining a sustainable workload.*
- *We're encouraged to bring forward new ideas. If technology, AI, or a better process genuinely helps our clients or our team, we're willing to embrace it.*
- *Juli, along with the broader leadership team, leads with grace and respect, balancing high expectations with thoughtfulness and care for people.*
- *There are no silos and no internal competition; instead, the team works collaboratively and “competes” together on behalf of our clients.*

CULTURE & LEADERSHIP

For experienced professionals seeking an alternative to the demands of larger public accounting firms, J.R. Martin & Associates offers a compelling opportunity. The firm has intentionally created a culture where technical excellence and exceptional client service coexist with sustainable workloads, collaborative leadership, and genuine work-life balance. As one team member shared, “We rarely work over 40 hours per week—even during tax season.”

At J.R. Martin & Associates, leaders are expected to create more leaders. Team members are coached rather than merely corrected, continuous learning is encouraged, and questions are welcomed. The culture is collaborative, supportive, and performance-driven, with humility, clarity, and kindness valued alongside technical excellence. Professionals are empowered to build meaningful client relationships, contribute new ideas, embrace AI-enabled technology and continuous improvement, and grow their careers in an environment that genuinely invests in people.



JULI MARTIN, CPA, CTS

J.R. Martin & Associates is led by Juli Martin, CPA, CTS, who brings more than two decades of public accounting and leadership experience and has led the firm since 2009. Guided by stewardship, service, and a desire to help others thrive, Juli has built a firm where people are encouraged to grow, contribute, and build rewarding, long-term careers while making a lasting difference for clients.

THE OPPORTUNITY

The Accounting & Tax Manager serves as the primary relationship manager for an assigned portfolio of closely held business clients, coordinating the accounting, tax compliance, tax planning, and advisory services provided throughout the year. This role is accountable for the overall health of each client relationship—ensuring work is proactive, coordinated, and responsive while providing trusted guidance to clients and leadership to the engagement team.

Following a structured onboarding and transition period, the Accounting & Tax Manager will assume ownership of an assigned client portfolio and serve as the final reviewer for most routine and moderately complex accounting work, financial statements, business and individual tax returns, and tax projections within demonstrated areas of competence. The role includes planning and coordinating engagements, mentoring team members, leading client conversations, exercising sound professional judgment, and recognizing when more complex, unusual, or higher-risk matters should be escalated to Juli or another senior CPA for consultation.

WHAT SUCCESS LOOKS LIKE

Within the first year, successful candidates will:

- **Develop** a strong understanding of J.R. Martin & Associates' clients, service model, systems, workflows, and quality standards.
- **Build trusted relationships** with assigned clients, team members, and firm leadership.
- **Assume ownership** of an assigned client portfolio, coordinating accounting, tax, advisory services, communication, and follow-through.
- **Progress** to independently serving as the final reviewer for routine and moderately complex accounting work, financial statements, tax returns, and tax projections within demonstrated areas of competence.
- **Lead** routine client meetings and participate with firm leadership in more complex planning and advisory conversations.
- **Manage** engagement status, deadlines, delegation, follow-up, and client communication across the assigned portfolio.
- **Provide** clear and constructive review feedback that improves both work quality and team capability.
- **Exercise** sound professional judgment by identifying accounting, tax, and business issues, proactively addressing client needs and escalating higher-risk matters appropriately.
- **Contribute** practical ideas that improve workflow, technology adoption, consistency, and client service.
- **Demonstrate** increasing independence and confidence while assuming greater client and review responsibility.

PRIMARY RESPONSIBILITIES

Own Client Relationships & Service Delivery

- Serve as the primary relationship manager and central point of accountability for an assigned portfolio of closely held business clients and their owners.
- Coordinate accounting, tax compliance, tax planning, and advisory services for assigned clients, ensuring engagements remain organized, responsive, and on track while delivering a consistently high level of client service.
- Lead recurring client meetings, establish clear next steps, and ensure commitments made by the firm and the client are appropriately documented and completed.
- Resolve routine client matters independently while escalating significant technical, relationship, or risk issues when appropriate.

Review Accounting, Tax & Advisory Work

- Serve as the final reviewer for routine and moderately complex accounting work, financial statements, business and individual tax returns, and tax projections within demonstrated areas of competence, ensuring quality and readiness for client delivery.
- Provide proactive tax planning and advisory guidance, helping clients understand the accounting, tax, cash-flow, and business implications of important decisions.
- Collaborate with Juli and other firm leaders on sophisticated planning matters while progressively assuming greater independence.
- Exercise sound professional judgment by identifying complex or higher-risk matters and involving firm leadership when appropriate.

Lead & Develop the Team

- Delegate work effectively while balancing engagement priorities, deadlines, and team-member development.
- Provide timely, constructive feedback that strengthens technical skills, professional judgment, and client service.
- Coach and mentor team members while fostering a collaborative, accountable, and growth-oriented culture.
- Contribute to internal training, knowledge sharing, and continuous professional development across the firm.

Strengthen the Firm

- Reinforce the firm's service model, quality standards, and established workflows.
- Champion the thoughtful use of AI, automation, and technology to improve efficiency and client service.
- Recommend improvements that enhance consistency, scalability, and the overall client experience.
- Support the continued evolution of advisory services, internal resources, and best practices.

IDEAL QUALIFICATIONS

Education & Certification

- Active CPA license (required).
- Bachelor's degree in accounting, finance, business, or a related field.

Experience & Expertise

- 5 or more years of progressive public accounting experience preferred.
- Experience preparing and reviewing business and individual income tax returns for closely held businesses and their owners, including final-review responsibility or demonstrated readiness to assume that responsibility.
- Experience reviewing accounting work, financial statements, and supporting schedules in preparation for tax compliance and advisory services.
- Experience managing client relationships, engagements, deadlines, and communication.
- Experience providing tax projections, proactive tax planning, and year-round advisory services.
- Experience delegating work, reviewing the work of others, and providing technical guidance or coaching.
- Strong working knowledge of federal taxation and the ability to research, analyze, and apply tax law to practical client situations.
- Ability to exercise sound professional judgment, including recognizing when consultation or escalation is appropriate.
- Comfortable using cloud-based accounting, tax, workflow, communication, and AI-enabled technologies. Experience with UltraTax CS, Fixed Assets CS, Planner CS, Qount, QuickBooks Online, Microsoft Excel, and Adobe is beneficial but not required. Adaptability and willingness to learn are most important.

Leadership & Personal Attributes

- Demonstrated ownership, accountability, and strong organizational skills, with the ability to manage client service, deadlines, work quality, and multiple priorities effectively.
- Ability to communicate technical accounting and tax matters clearly while providing direct, respectful, and constructive feedback to clients and team members.
- Sound judgment, intellectual curiosity, and a collaborative leadership style with a genuine commitment to helping others succeed.
- Strong attention to detail while balancing broader client and business considerations.
- Comfortable working in a structured, continuously improving environment while effectively managing client relationships and workflow in a hybrid or remote setting.
- High integrity, professionalism, kindness, and commitment to excellence.

WORK ARRANGEMENT & LOCATION

J.R. Martin & Associates welcomes onsite, hybrid, and fully remote candidates. Regardless of location, the Accounting & Tax Manager must be highly responsive, comfortable leading client and team meetings virtually, and able to thrive within the firm's collaborative culture, structured workflows, and commitment to exceptional client service.

For candidates considering relocation, Redding offers an exceptional quality of life, combining a lower cost of living than many California markets with outstanding outdoor recreation, a strong sense of community, and easy access to destinations such as Lassen Volcanic National Park, Mount Shasta, and Whiskeytown National Recreation Area.

GROWTH

J.R. Martin & Associates may also consider an exceptional CPA who demonstrates strong long-term manager potential but has not yet developed every capability required to independently manage all aspects of a client portfolio. Such a candidate may be considered for the firm's structured Accounting & Tax Manager in Training path, with compensation, responsibilities, supervision, and development milestones aligned to the individual's current experience.

The firm offers a sustainable work model, professional development support, and an intentional path toward increasing client responsibility, mentoring opportunities, and professional growth.

SEARCH PROCESS

Ardent Search Company has been retained by J.R. Martin & Associates to conduct this search. To learn more or express interest in this opportunity, please contact Tim Bernstein, President of Ardent Search Company, using the contact information below.

At J.R. Martin & Associates, relationships matter. The firm's thoughtful, professional hiring process reflects the same intentionality, care, and commitment to excellence that define its culture and client relationships. Rather than relying on a single interview, the process is designed to create meaningful opportunities for both the candidate and the firm to get to know one another, ensuring a strong long-term fit for everyone involved.

Throughout the search, Ardent Search Company will handle all inquiries with the utmost discretion and confidentiality. Candidate information will not be shared with J.R. Martin & Associates without the candidate's knowledge and consent, and professional references will not be contacted until mutual interest has been established.

Thank you,

Tim Bernstein, President
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