CAREERS

Tax Manager

FULL-TIME · $80,000 – $100,000

A tax professional who will do more than prepare returns and move work through a compliance process — a key member of the team helping us scale a proven advisory model and shape the next stage of the firm's growth.

ABOUT KFG

An integrated firm built around business owners.

Founded in 1998, Keller Financial Group is an integrated advisory firm built around business owners. We bring bookkeeping, tax, financial planning, investments, and business advisory together under one roof, then serve owners across the full ownership lifecycle: building the company, preparing for and navigating a transition, and stewarding the wealth and legacy that follow.

Now in its second generation of ownership, KFG is at an important inflection point. We have proven an integrated advisory model that combines the strategic depth of experienced advisors with the focus, continuity, and care of a close-knit, operator-minded team. We are now ready to scale that model thoughtfully, expanding our capacity while preserving the quality, judgment, and long-term relationships that make it work. Tax is central to that growth because our clients' business and personal finances must be understood as one integrated picture.

ABOUT THE ROLE

Broader exposure, real ownership.

KFG is now hiring a Tax Manager to become a key member of the team as we scale this integrated advisory model.

This position is for a tax professional who has developed strong fundamentals in public accounting, a large tax firm, or another rigorous tax environment and is ready for a different kind of next chapter: broader client exposure, meaningful ownership, hands-on learning, and the opportunity to help shape a growing tax function.

You will manage individual and business income-tax workflows while working closely with colleagues across bookkeeping, financial planning, investments, and business advisory. You will be hands-on with the files, the numbers, client follow-up, and the underlying accounting that supports the tax work.

The role is not confined to a narrow tax silo. You will see how each client's tax position connects to the business, the family, and the longer-term plan.

WHAT YOU WILL HELP BUILD

Four things we are building, with you.

01	A tax function that is fully integrated into each client's business and personal financial picture.
02	A repeatable, technology- and AI-enabled service model for business owners.
03	Better workflows, documentation, and client experiences that improve quality while protecting sustainable workloads.
04	A learning-oriented culture that values strong technical work, sound judgment, curiosity, and continuous improvement.

KEY RESPONSIBILITIES

The work itself.

Income Tax Preparation

- Managing and supporting the preparation of individual, business, and fiduciary income-tax returns, including Forms 1040, 1120-S, 1120, 1065, and 1041.
- Organizing and reviewing client tax information for completeness, consistency, and tax readiness.
- Working directly with clients to resolve missing, unclear, or inconsistent information.
- Preparing internal summaries and review notes that support accurate and efficient tax work.

Tax Operations & Compliance

- Coordinating quarterly estimated income-tax payments and related client follow-up.
- Logging tax notices, monitoring deadlines, and preparing information for resolution.
- Supporting Pennsylvania and multistate income-tax compliance.

Tax-Ready Accounting Support

- Reviewing general-ledger activity and financial statements to identify issues affecting tax reporting.
- Reviewing client books in QuickBooks Online and preparing reports used in tax preparation.
- Providing QuickBooks Online support and troubleshooting.

Payroll & Payroll Tax

- Supporting payroll processing, payroll-tax filings, payment tracking, and year-end W-2 and 1099 coordination.

Process & Client Experience

- Improving workflows, documentation, technology use, and the overall client experience.

WHAT WE ARE LOOKING FOR

Experience and qualifications.

- Meaningful experience with individual and business income-tax preparation.
- Strong federal and state income-tax fundamentals.
- Experience reviewing general ledgers and financial statements for tax purposes.
- Strong working knowledge of QuickBooks Online.
- Payroll-processing and payroll-tax experience.
- Strong organization, documentation, and deadline-management skills.
- Good written and verbal communication.
- Sound judgment, initiative, and attention to detail.
- A demonstrated commitment to personal and professional growth.

Credentials. A CPA license is not required. An Enrolled Agent or CPA credential is helpful and valued.

COMPENSATION

$80,000 – $100,000.

Depending on experience and credentials, plus health, dental, and vision insurance, a retirement plan with company match, and 20 days of paid time off. You will also have direct access to the firm's senior advisors, hands-on exposure to complicated business-owner issues, and the opportunity to influence the systems and processes the firm uses as it grows.

WHY THIS ROLE IS DIFFERENT

Six reasons this is not a lane.

Build something real, don't just execute a pile of returns.

You will help shape the systems, workflows, and client experience that allow KFG to scale its proven model. Your ideas will matter, and you will be close to the decisions that determine how the firm grows.

See the whole picture.

Because we work across books, tax, planning, investments, and business advisory, you will understand why a client's numbers look the way they do and how the tax work connects to decisions that matter.

Learn by doing.

You will work closely with experienced team members, gain exposure to business-owner issues, and develop through hands-on work rather than being limited to a narrow lane.

Make a visible impact.

Our clients are business owners we know well. Your work will have context, and you will be able to see how it improves the quality of advice and the client's financial life.

Have a sustainable career.

We are intentionally building structured workflows, preparation up front, and reasonable hours. We prioritize excellent work without treating constant 70-plus-hour weeks as a badge of honor.

Join at the ground floor.

This is an opportunity to become a foundational contributor at an inflection point: the model is proven, and the team, systems, and capacity are now being built to scale it thoughtfully.

WHO WILL THRIVE HERE

Strong fundamentals, ready for more.

This role is likely to appeal to someone who has put in the time to build strong technical skills and is now looking for more breadth, more ownership, closer client relationships, and a healthier long-term way to do excellent work. You may be ready to move beyond a traditional large-firm path and help build something distinctive with a boutique, ambitious team.

Who this role is not for. This role is not a good fit if you are interested in bookkeeping-only or data-entry-only work, prefer to stay within a narrow tax silo, or view extreme busy-season hours as the only way to produce high-quality work. KFG prioritizes accuracy, consistency, thoughtful collaboration, and sustainable workloads, including during busy season.

HOW TO APPLY

Send us a note.

Email your resume to info@kellercpa.com, along with a few sentences about what you are looking for. Every note reaches a person here, and we answer.