



CERTIFIED PUBLIC ACCOUNTANT (CPA)

Harrison & Associates CPAs

POSITION SUMMARY

Harrison & Associates CPAs is a growing Iowa accounting and advisory firm expanding into the Cedar Valley. We are seeking an experienced CPA who is excited about serving clients, developing people, building relationships, and helping establish our presence in the Cedar Falls/Waterloo community.

This role is designed for a balanced CPA-leader: someone who enjoys the technical side of the profession while also wanting to lead client relationships, mentor team members, develop community connections, and help shape the future of a growing office. The position owns client work, delegates assignments effectively, develops staff, and helps clients make informed tax and business decisions.

KEY RESPONSIBILITIES

- Serve as a primary advisor to individuals and business owners, providing proactive tax and business advisory services related to entity structure, estimated taxes, transactions, cash flow, business decisions, and other tax-sensitive matters.
- Prepare and review complex individual, corporate, partnership, and other tax returns; identify issues, opportunities, and follow-up items that should be discussed with clients.
- Lead client meetings and communicate tax strategies, risks, recommendations, deadlines, and information needs in a clear, practical, and business-focused manner.
- Delegate engagement tasks to appropriate team members based on experience, workload, and development needs; establish clear expectations and deadlines and ensure work moves through the firm efficiently.
- Monitor assigned work, follow up on progress, remove roadblocks, and reassign or escalate work when needed to meet client commitments and filing deadlines.
- Review work prepared by team members, provide timely feedback and coaching, and ensure engagements meet firm quality, documentation, budget, and profitability expectations.
- Coordinate with accounting and advisory team members when financial information or broader business insight is needed to serve clients well.
- Build strong long-term client relationships, identify additional advisory needs, and help clients think beyond compliance to the decisions and opportunities ahead.
- Help establish Harrison & Associates as a trusted presence in the Cedar Valley by developing relationships with clients, prospective clients, community leaders, and other professional advisors.



LEADERSHIP & GROWTH OPPORTUNITY

- Help shape Harrison & Associates' growing Cedar Valley presence, including client relationships, local reputation, community engagement, and future team development.
- Mentor and develop team members while modeling ownership, accountability, sound judgment, and exceptional client service.
- As the Cedar Valley presence grows, take on increasing leadership responsibility for client relationships, team development, and the growth of the local office.

WHO THRIVES IN THIS ROLE

- Enjoys building long-term relationships with business owners and being viewed as a trusted advisor, not simply a tax preparer.
- Takes ownership, follows through, and is comfortable exercising professional judgment without significant day-to-day oversight.
- Enjoys developing younger professionals and helping others become more capable and confident.
- Is comfortable meeting new people, developing professional relationships, and being visible and engaged in the Cedar Valley community.
- Likes the idea of helping build and shape a growing office while having the resources, team, and infrastructure of an established CPA firm.

REQUIRED SKILLS AND ABILITIES

- Strong federal and state tax knowledge with demonstrated experience advising closely held businesses and individual clients.
- Excellent analytical, problem-solving, and professional communication skills; able to explain complex tax matters in an understandable, business-focused way.
- Ability to work independently, exercise sound professional judgment, and collaborate effectively with clients and colleagues.
- Demonstrated ability to lead client relationships, coach team members, and manage multiple priorities and deadlines.
- Proficiency with professional tax, workflow, document-management, and Microsoft Office applications; experience with UltraTax or similar tax software preferred.

EDUCATION AND EXPERIENCE

- Active CPA license required; bachelor's degree in accounting, finance, business, or a related field.
- At least five years of public accounting experience with increasing responsibility in tax compliance, tax advisory, client management, and staff supervision.
- Commitment to maintaining required continuing professional education (CPE) and staying current on tax law and industry developments.