

**Office of the Controller
Director of Tax and Compliance**

Reports to: Controller

Job Summary:

Under the general direction from the Controller, the Director of Taxation and Compliance is responsible for all aspects of the University's tax planning and compliance program, including the filing of federal and state tax returns. The Director will be expected to review and interpret information received related to the University's revenues, and other activities, to determine possible taxability under Unrelated Business Income Tax (UBIT) regulations, and to ensure the accuracy and full disclosure of required information in the University's federal and state tax filings. This position supports University leadership with sound tax research, planning and advice. It advises University departments on tax related matters including payroll, imputed income reporting for taxable fringe benefits, form 1042, form 1098T and form 1099 mandatory reporting, taxability of financial aid such as fellowships, etc. The Director reviews, develops, and implements policies and procedures to ensure compliance with federal and state laws. This position is also responsible for recommending and implementing internal corrective action to areas of non-compliance.

Job Duties:

- Develops policies and procedures and ensures compliance with federal and state tax laws and regulations; develops tax strategy and tax planning; proposes strategies to minimize the university tax burden while maintaining proper compliance with existing laws.
- Responsible for completion of federal and state income tax returns including all related analysis, documentation and support.
- Responsible for audits of federal, state and international income tax and state and local filings.
- Serves as a member of the leadership team that provides reports and analysis of tax laws and regulations that will help influence the University's collective bargaining strategies.
- Reviews University compensation policies, employment tax issues; employee fringe benefits; state and federal form 1099 miscellaneous reporting; charitable contributions; advises as necessary on tax exempt bonds; deferred compensation plans; tuition benefits; and other benefits negotiated through collective bargaining to identify potential tax issues.
- Reviews University revenue producing activities to identify potential tax issues including cell tower revenue; investment in partnerships; out of session dormitory rentals; advertising income; corporate sponsorships; operation of parking lots; professional entertainment; use of facilities by general public; summer sports camps; publishing activities; affinity credit cards; restaurant operations; catering activities; conferences, meetings, and training programs; athletic events and television and broadcast rights, etc.
- Reviews scholarships, fellowships and grants as well as charitable contributions, overseas activities, etc. to identify potential tax issues; reviews all estate gifts directly to the University and legal documents supporting the gifts; reviews noncash gift IRS form 8283 and supporting documentation.
- Keeps current and abreast of changes to IRS and state tax laws, regulations and codes.
- Conducts workshops and seminars for administrators, faculty and staff regarding tax laws.
- Performs other duties as required.

Minimum Qualifications:

- Combination of Bachelor's degree or MS, MBA, Juris Doctor or CPA with relevant courses in taxation and seven to ten years of experience in taxation
- Knowledge of state and federal tax laws
- Significant ability in legal/tax research
- Excellent written and oral communication skills
- Experience in the use of technology and tax research software and/or online tax research resources

Preferred Qualifications:

- CPA and/or J.D.
- Experience and significant knowledge of non-profit taxation
- Tax research experience as it applies to institutions of higher education