



Financial Accountant – Premium Tax Coordinator

SUMMARY:

The Financial Accountant – Premium Tax Coordinator is responsible for overseeing and coordinating the premium tax preparation and remittance process, in addition to the preparation and completion of financial reports to internal management, the parent company and regulatory bodies based on experience and knowledge.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Plan, oversee and coordinate premium tax preparation, review and delivery
- Assist in preparing state income tax, Texas sales tax, and property tax returns as delegated / assigned by supervisor
- Prepare annual and quarterly statutory financial statements for assigned insurance company(ies)
- Assist with quarterly tax provisions as delegated / assigned by supervisor
- Assist in preparing estimated tax payment calculations and payments as delegated / assigned by supervisor.
- Assist in the completion of other state filings
- Assist with the research of tax or other regulatory matters as needed using the internet and other reference materials.
- Prepare miscellaneous financial analyses and reconciliations
- Handle correspondence received from state insurance departments and attorneys
- Maintain and / or develop Access programs to automate job functions (based on expertise)
- Cooperate with the Company's external auditors and examiners
- Assist with other analytical projects
- Conduct Company business in accordance with all applicable laws, regulations and contractual obligations. Behave ethically and with integrity and always follow the principles of the Compliance Program when making business decisions. Compliance with this program is a condition of employment for every American-Amicable employee.

EDUCATION, WORK EXPERIENCE and TRAINING REQUIREMENTS:

- Bachelor's degree required, CPA preferred
- Previous experience in insurance statutory and tax accounting

REQUIREMENTS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- A friendly, positive, learning-oriented attitude.
- Typing and 10-key
- Advanced PC skills including Microsoft Excel, Word and Access
- Well organized, detail oriented, able to work independently and think critically
- Effective oral and written communication skills

WORKING CONDITIONS, PHYSICAL and MENTAL REQUIREMENTS: The working conditions, physical and mental requirements described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Work is sedentary in nature and is performed in a traditional office environment with cubicles. Typically, the incumbent will sit comfortably while performing the work, with some walking, standing, bending and carrying of light items, such as papers, books, and files. Other physical demands in performing the essential functions of this position include: digital dexterity, hearing, seeing, and talking. Mental requirements include, but are not limited to, the ability to concentrate, take initiative, cope with stress, adapt, and stay alert in a business environment.

Note: This job description reflects a summary of the job and does not prescribe or restrict the responsibilities that may be assigned. This job description is subject to change at any time.