CBIZ

CVENTURES, INC.

Senior Tax Manager

CVentures

A private family office opportunity for an experienced, collaborative tax leader

A rare opportunity

This role is designed for an experienced tax professional who values complex family office work, direct connection to business and investment activity, and a collaborative culture that offers a more sustainable cadence than many public accounting environments.

Overview

CVentures offers a distinctive opportunity for an experienced tax professional to join a highly private family office with significant complexity, breadth, and a long-term orientation. The Senior Tax Manager will step into a role where tax is integrated with the broader enterprise. Tax decisions are connected to accounting, investments, estate planning, family trusts, nonprofit and foundation activity, business operations, and senior-level decision-making.

This is not a traditional compliance-focused position, nor is it a role for someone who prefers to work solely from completed financial statements. The successful candidate will need to understand the activity behind the numbers, ask thoughtful questions, identify issues early, and work collaboratively with colleagues across the family office.

For the right candidate, the opportunity combines sophisticated technical work, meaningful proximity to decision makers, cross-functional exposure, long-term career potential, and a more sustainable professional cadence than many public accounting environments.

At a Glance	Summary
Organization	**CVentures**, a family office supporting a broad enterprise platform.
Role	Senior Tax Manager
Scope	Approximately 140 entities, including family trusts, partnerships, LLCs, S corporations, nonprofits, private foundations, and individuals.
Industries and activities	Real estate, homebuilding, oil and gas, commercial and residential property, investments, alternative investments, family office operations, and mission-related initiatives.
Best-fit candidate	Family office or sophisticated regional or national tax firm experience, with exposure to ultra-high-net-worth clients, partnerships, trusts, and complex entity structures.
Work environment	Primarily in office, collaborative, service-oriented, and team-based, with flexibility where practical around family needs, commute patterns, and seasonal demands.
Compensation	Competitive and market-responsive, based on experience, alignment with the role, and the level of responsibility assumed.

About CVentures

CVentures is an intentionally low-profile family office supporting a broad portfolio of family, investment, business, trust, nonprofit, and foundation-related activities. The organization does not maintain a public website by design. Discretion, privacy, substance, and long-term trust are central to how the family office operates.

The platform is wide-ranging and complex. There are approximately 140 entities connected to roughly 12 individuals or family members, including family trusts, partnerships, LLCs, S corporations, nonprofits, private foundations, and other structures. The work touches real estate, homebuilding, oil and gas, commercial and residential property, investments, alternative investments, family office operations, and mission-related initiatives.

Because the entity structure is broad and the activity is varied, the tax function must be closely aligned with the broader organization. The Senior Tax Manager will work with accounting, investments, outside advisors, legal resources, and senior leadership to understand how decisions in one area affect reporting, planning, compliance, and performance in another.

Mission, Stewardship, and Long-Term Impact

CVentures is more than an investment platform. Alongside its diverse business and investment interests, the organization supports charitable, nonprofit, and mission-driven initiatives that reflect a long-term commitment to responsible stewardship and community impact.

This broader perspective distinguishes the family office environment. Decisions are often evaluated not only through a financial lens, but also through the context of legacy, family values, governance, and long-term impact. As a result, professionals at CVentures have the opportunity to contribute to work that spans operating businesses, investments, trusts, foundations, and mission-focused organizations.

For the Senior Tax Manager, this creates a uniquely engaging environment where tax, planning, compliance, and advisory work support a broad portfolio of activities united by a long-term view of value creation and stewardship.

Why This Role Is Different

Sophisticated Work Without the Traditional Public Accounting Model

This role will appeal to a tax professional who values technical complexity and wants to be closer to the business while gaining greater predictability and sustainability than is often available in public accounting. The work is challenging, but it is embedded within one organization, one family office ecosystem, and one long-term platform.

Tax Is Integrated with the Enterprise

At CVentures, tax affects financial reporting, investment analysis, trust and estate planning, entity structuring, cash flow projections, and decision-making across the family office. The Senior Tax Manager must understand how tax positions connect to underlying business activity and how decisions in one area may create implications for another team or entity.

Broad Family Office Exposure

The role includes compliance and planning for approximately 125 to 140 entities, with exposure to individuals, partnerships, LLCs, trusts, S corporations, nonprofits, private foundations, and a variety of investment and operating activities. This creates a broad and intellectually engaging platform for someone with family office, private client, partnership, trust, or closely held business experience.

Long-Term Growth Potential

This role has the potential to become a trusted successor within the tax function over time. Current tax leadership is expected to be thoughtful about transition and knowledge transfer. For a candidate seeking stability, ownership, and long-term growth, that succession dynamic is a meaningful part of the value proposition.

Culture

The culture at CVentures is collaborative, practical, and team-oriented. The successful candidate must be technically strong, but technical strength alone will not be sufficient. This is a setting where communication, humility, judgment, accuracy, and service orientation matter every day.

A Service-Oriented, Team-First Culture

The culture values professionals who are willing to contribute where needed. Titles are respected, but contribution, reliability, and partnership are what build trust. The right candidate will bring senior-level technical capability while also demonstrating a practical, team-first approach.

This expectation does not diminish the seniority of the role. Rather, it reflects the reality of a high-performing family office where work is interconnected, and trust is earned through ownership. The best fit will be someone who can lead complex tax work, collaborate across departments, ask thoughtful questions, and help resolve issues before they move downstream.

Attention to detail is especially important. In this environment, a candidate cannot dismiss an issue because it appears immaterial in isolation. One small error can affect another group, another entity, another family member, or another reporting process. The organization values accuracy, follow-through, and the discipline to get work right, even when doing so takes additional time.

Role Overview

The Senior Tax Manager will serve as a key tax leader within CVentures, responsible for managing compliance, planning, analysis, and advisory work across a complex and diverse family office platform.

- Manage tax compliance for a broad portfolio of approximately 125 entities, including individuals, partnerships, LLCs, S corporations, trusts, nonprofits, private foundations, and related structures.
- Review federal and state income tax matters, with preparation of returns as needed due to complexity and deadline management.
- Analyze and review annual general ledger information, complex transactions, accounting records, investment activity, and technical tax matters.
- Respond to federal and state tax correspondence and manage examinations and audits.
- Lead income tax planning and estimated tax payment processes.
- Support implementation of estate planning strategies in coordination with attorneys and outside advisors.
- Supervise tax staff and manage projects outsourced to tax consultants.
- Develop, document, maintain and improve tax processes, procedures, and internal workflows.
- Review monthly financial statements for accuracy, completeness, and consistency across entities.
- Work directly with accounting colleagues to communicate questions, resolve issues, improve quality, and ensure adherence to policies and procedures so that issues do not become downstream tax problems.
- Prepare cash flow statements, projections, analysis, and ad hoc reporting as needed.
- Evaluate performance and tax considerations related to brokerage accounts, alternatives, oil and gas interests, real estate, private equity, and other investments.
- Partner with senior management on non-routine projects, transaction analysis, systems integration, and other cross-functional priorities.

Ideal Candidate Profile

The strongest candidates will likely come from another family office, a private investment office, or a sophisticated regional or national tax firm serving high-net-worth families, partnerships, trusts, estates, closely held businesses, and complex private client structures.

Technical Strength	Personal Fit
Eight or more years of income tax experience.	Collaborative, low-ego, and willing to contribute beyond the boundaries of a narrow job description.
CPA preferred, with a strong accounting foundation.	Clear communicator who works effectively with accounting, investments, legal, outside advisors, and senior leadership.
Experience with partnerships, trusts, high-net-worth individuals, family groups, and multi-entity structures.	Detail-oriented and committed to accuracy, even when additional review is required.
Knowledge of investment activity, brokerage accounts, alternative investments, real estate, oil and gas, and closely held business structures.	Curious about the business context behind the tax work and comfortable asking thoughtful questions.
Ability to review financial statements, general ledger activity, and complex transactions.	Long-term mindset and interest in growing with a private, discreet family office platform.
Technology savvy, with ProSystem experience preferred.	Comfortable in an in-office, service-oriented culture that values practical contribution and teamwork.

This opportunity is well suited for a candidate who continues to value complex tax work, but also wants to be closer to the business, more integrated with decision-making, and part of a team where they can build a long-term career.

Compensation & Value Proposition

CVentures offers a competitive and market-responsive compensation package. Compensation will be based on experience, technical capability, alignment with the role, and the level of responsibility the individual is prepared to assume. The broader value proposition includes:

- Competitive base salary plus discretionary bonus.
- Complex family office work across a significant multi-entity platform.
- More direct connection to business, investment, accounting, and estate planning activity than is typical in public accounting.
- The opportunity to become a trusted long-term successor within the tax function.
- A collaborative culture that values humility, service, precision, and ownership.
- A more sustainable cadence than traditional public accounting, while preserving technical challenge and intellectual variety.
- Primarily in-office work with practical flexibility around family needs, commute considerations, and occasional seasonal demands.
- Benefits expected to include health and dental coverage, 401(k) with match, PTO, sick time, floating holidays, and additional workplace amenities such as stocked kitchen and subsidized lunch options.

Why Join CVentures

CVentures is seeking a Senior Tax Manager who wants more than a technical tax role. This is an opportunity for a professional who enjoys complexity, values discretion, and wants to be close to the business activity behind the tax work.

The ideal candidate will be highly capable, deeply accountable, and genuinely collaborative. They will understand that excellence in a family office requires both technical expertise and a service-oriented mindset. They will be comfortable managing sophisticated entity structures, partnering with colleagues across functions, working with senior leadership, and contributing wherever the broader team needs support.

For an experienced tax professional seeking a rare combination of challenging work, private family office complexity, long-term career potential, and a more sustainable professional cadence, this role offers a compelling next chapter.

To Apply

CBIZ, an executive search firm, is assisting CVentures with this important search. All calls and inquiries should be made through the search firm. Applications will be held in confidence.

Please Apply here: Executive Director or email: tamara.wesely@cbiz.com

Non-Discrimination

Our client and CBIZ firmly support the principle and philosophy of equal opportunity for all individuals, regardless of age, race, gender, creed, national origin, disability, veteran status or any other protected category pursuant to applicable federal, state or local law.

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