

PhillipCapital

Phillip Capital Inc. Employment Opportunity

Job Title: Tax Information Reporting Analyst (Hybrid: Onsite and Remote Work)

Location: Chicago, IL

About Phillip Capital Inc. and the Phillip Capital Group

Phillip Capital Inc. is dually registered with the SEC/FINRA as a self-clearing broker dealer and with the CFTC as a registered Futures Commission Merchant (FCM). A career at Phillip Capital offers the opportunity to develop skills and make meaningful and visible contributions to both your team and to the company. Phillip Capital believes in integrity, accountability, open communication, and continual improvement building for the long term. The office, in the iconic Board of Trade Building, is conveniently located near Metra and CTA lines and close to restaurants, parks, shopping, and cultural institutions. Building amenities include a rooftop deck, a gym, and indoor bicycle parking. Learn more about us at www.phillipcapital.com and www.phillip.com.sg.

Responsibilities

- Review and validate tax forms (W-9, W-8BEN, W-8BEN-E, W-8ECI, W-8EXP, W-8IMY, and other forms as required), FATCA and CRS certificates submitted by users, and handle all inquiries related to these documents.
- Accurately and timely file Forms 1099, Forms 1042 and 1042-S, FBAR, and FATCA/CRS reports with relevant tax authorities.
- Conduct regular assessments of necessary information reporting and withholding processes in compliance with IRC Chapters 3, 4, and 61, as well as state tax reporting, ensuring audit readiness for cross-functional teams.
- Assist in drafting and implementing tax policies on complex issues including tax reporting, withholding applicability and the collection and validation of tax documentation.
- Collaborate effectively with other areas of the organization to implement tax requirements and enhance tax reporting processes.

Qualifications

- Bachelor's Degree in accounting, finance, or a related field.
- 3-5 years of experience in tax information reporting and withholding, either at an accounting or law firm, in-house within the financial services industry, or a combination of both.
- Familiarity with the onboarding and year-end reporting processes for tax identity information collection.
- Experience reviewing W-9 and W-8 forms, along with FBAR, FATCA, and CRS self-certifications, and reporting to tax authorities.
- Ability to work in a fast-paced, dynamic environment and adapt to changes in regulatory requirements.
- Hands on experience with financial software and Microsoft Excel.
- Necessary traits: absolute integrity, strong sense of ownership, detail oriented, excellent communication skills, and ability to reflect upon and learn from mistakes.

The pay range for this position is \$100-120K.

Preferred Qualifications: Advanced degree or professional certification (CPA, JD or equivalent, EA, Masters in Tax or LLM) knowledge of SQL or other programming languages, familiarity with SEC and CFTC regulations.

PhillipCapital

Please apply via LinkedIn or Indeed or submit a resume directly to careers@phillipcapital.com with “Tax Information Reporting Analyst” in the subject line to be considered for this position. Phillip Capital Inc. will not consider candidates sent by recruiters for this position.