Manager

PDM LLP | Torrance, CA | Onsite | Full-Time

Department:	Client Service Tax
Reports To:	Senior Manager / Director / Partner
Location:	Torrance, CA — Onsite. Hybrid flexibility may be considered on a case-by-case basis once familiarity with staff and client base is established.
Compensation:	Annual Salary range of $137,500 to $165,000, depending on qualifications and experience.
Benefits:	Medical, dental, vision, and life insurance; vacation, sick leave, and paid holidays; profit sharing. Benefits subject to confirmation with HR.

About PDM

PDM LLP is a Torrance-based CPA firm of approximately 40 professionals serving small and mid-size businesses, their owners, and the families behind them. Our client relationships are built on more than compliance. We take a holistic approach to understanding each client's full financial picture, providing advisory services that go well beyond the return. Many of our client relationships span generations, with businesses and families who trust PDM as a long-term partner through transitions, growth, and every stage in between. Our focus is on being genuinely useful to clients year-round, not just at tax time.

The Opportunity

PDM is looking for a Manager who is ready to own client relationships, lead engagements, and develop the team around them. This is a full-ownership role. You will carry a portfolio of clients, manage Tax Staff and Seniors on your engagements, begin developing an understanding of engagement profitability, and contribute to the firm's growth through business development activity.

The Manager we are looking for does not wait. They reach out to clients before clients call. They identify issues on a file before the reviewer does. They give their team feedback before a pattern becomes a problem. If that is how you already operate, we want to talk. We are also looking for someone who understands that client relationships at PDM are built over years and often across generations — and who is genuinely committed to building their own relationships alongside the Partners they work with, creating the kind of continuity that keeps clients connected to the firm for the long term.

What You Will Own

Client Relationships

- Serve as the primary contact for an assigned portfolio of clients, with full accountability for service quality and client satisfaction.
- Communicate with clients proactively throughout the year on planning opportunities, law changes, and compliance matters — not just at filing time.
- Build trusted relationships grounded in responsiveness, technical authority, and genuine understanding of each client's business and goals.
- Identify advisory and cross-sell opportunities within your client base and act on them without waiting to be prompted.

Engagement Execution

- Plan, staff, and oversee tax engagements from setup through final delivery.
- Set clear expectations for Tax Staff and Seniors before work begins and monitor progress continuously.

- Review complex individual and business returns to a Partner-ready standard.
- Perform final review of outsourced and AI-assisted prepared returns before Partner sign-off.
- Intervene early when timing, quality, or technical issues arise — not when they are about to miss a deadline.

Engagement Profitability

- Develop a working understanding of engagement budgets, realization rates, and write-offs on your client base.
- Monitor time and billing on assigned engagements and identify opportunities to improve efficiency.
- Participate in client billing and collections as directed by Senior Manager or Partner.

Team Development

- Provide consistent, direct, and development-oriented feedback to Tax Staff and Seniors on your engagements — before patterns become problems.
- Identify skill gaps early and create or recommend targeted learning opportunities.
- Actively mentor Seniors developing toward Manager readiness.
- Contribute to formal performance reviews for Tax Staff and Seniors.

Technical Leadership

- Serve as the technical resource for Tax Staff and Seniors on complex issues and filing positions.
- Stay current on federal and California tax law and communicate relevant developments to your team.
- Lead or contribute to in-house training sessions and tax department meetings. Come prepared, keep discussions focused, and ensure the team leaves with clarity. Tax department meetings are a shared resource — come prepared, keep them focused, and ensure the team leaves with clarity.

Business Development

- Build a referral network and actively participate in networking and professional community involvement.
- Represent PDM professionally in every external interaction with the understanding that every touchpoint is a business development opportunity.
- Identify cross-sell and expanded service opportunities and bring them forward proactively.

What We're Looking For

- Proactive ownership as a default: you identify issues before they escalate, communicate before clients ask, and develop staff before gaps affect quality.
- Proven ability to manage client relationships independently with technical authority and genuine client-service instincts.
- Experience reviewing complex individual and business returns to a high standard.
- A genuine commitment to developing others, demonstrated through consistent feedback and real investment in team members' growth.
- Minimum 5 years of public accounting experience with a focus on tax, including at least 2 years in a Senior or equivalent role.
- Bachelor's degree in Accounting or a related field. Advanced degree (MST or MBA with tax focus) preferred but not required.
- CPA or EA licensure required. No exceptions.

The Career Path

Manager is the third level of PDM's tax career ladder and the first role with full client relationship ownership. The path from here is:

Tax Staff → Senior → Manager → Senior Manager → Director → Partner

Managers who demonstrate consistent client relationship performance, strong team development outcomes, growing engagement profitability awareness, and active business development contribution are the natural candidates for Senior Manager. PDM invests in its Managers and provides direct exposure to Senior Manager-level responsibilities for those on the advancement track.

Why PDM

- A client base with real complexity: SME (small to mid-sized enterprise) owners, family-held businesses, generational transitions, and multi-entity structures that require advisory thinking, not just compliance execution.
- A modern, automation-forward practice where your time goes to client relationships and judgment, not routine preparation.
- A firm that is actively building its next generation of Senior Managers and Partners and promotes from within.
- Long-standing client relationships with real depth — you will be expected to understand the history behind each one and build your own genuine relationship alongside the Partner's.
- Structured development with clear benchmarks, formal reviews twice a year, and direct access to Senior Manager and Partner-level mentorship.
- Direct access to Partners and Senior Managers. Our open-door policy is real.

How to Apply

Send your resume and a brief note on why PDM is the right fit to:

careers@pdmcpas.com

We review all applications and will respond to qualified candidates within 5 business days. No phone calls please.

PDM LLP is an equal opportunity employer. We do not discriminate on the basis of race, color, religion, sex, national origin, age, disability, sexual orientation, gender identity, veteran status, or any other characteristic protected by applicable law.