PERSPECTIVE
Wealth Partners

About You

Are you an accomplished tax associate with several years of experience? Do you love taxes but are tired of working double time during tax season? Do you love saving clients money but seldom have the time because of the sheer number of returns or an inability to recommend actions throughout the year?

Do you want to be a bigger part of something smaller vs a small part of something bigger? Do you aspire to become a partner in the firm you make a difference in?

If you would like to lead a tax practice in a fast-growing wealth management firm, read on!

About Perspective Wealth Partners

Perspective Wealth Partners ***(PWP),*** founded in 2006, is a fee-only SEC-registered RIA, located in Boise, Idaho and serves about 250 households with approximately $700MM in assets.

We are seeking an experienced and proven professional who desires to be an integral part of a small team, while making a deep impact on clients. The firm currently has nine employees, six advisors, and three support staff.

PWP offers clients a wealth management experience that allows them to relax and have confidence pursuing their intentions. We are obsessive about optimizing after-tax return for our clients. With CPAs on staff, our clients rely on us for in-depth tax planning and analysis.

In tandem with providing a first–rate wealth management experience, we are also purposeful about helping our clients live meaningful lives, thereby being a trusted thought-partner in non-financial areas.

As a fiduciary to our clients, PWP is legally obligated to provide investment portfolio management and financial planning that is in a client’s best interest without selling any products or receiving commissions.

We are deeply intentional about our internal culture and core values, which are comprised of: being service-oriented, committed to excellence, heartfelt, relatable, and genuine.

PWP offers competitive compensation including salary and bonus, 401(k), health insurance, and paid time off *(PTO).* For the successful candidate, we would offer a relocation allowance to offset moving expenses.

PWP is an Equal Opportunity Employer. We support diversity in the workplace and embrace diversity in the clients we serve.

Role Summary

We are looking to hire a detail-oriented and proactive Tax Lead to lead our tax preparation initiatives.

This position offers the potential for growth, including broader accounting and finance responsibilities for the firm and managing additional tax preparers as the service offering expands to more clients. An ideal candidate’s career progression could lead to significant firm leadership opportunities and potential ownership.

Core Responsibilities

- Lead tax return preparation for a portfolio of 75-125 clients.
- Manage quarterly estimates and withholding recommendations.
- Handle notices, audits, and amendments efficiently.
- Serve as the primary expert on tax technology tools (currently using Drake and Holistiplan).
- Provide regular updates on tax legislation and news to team and clients.
- Support year-round tax planning and tax-loss harvesting initiatives.
- Collaborate with financial advisors to enhance client service.
- Promote a culture of compliance within the advisory team by following and enforcing firm policies and procedures and all applicable compliance rules and regulations.
- Active community participation.

Interpersonal Qualifications

- Strong alignment with PWP's firm's vision and values.
- Positive energy and professional, upbeat attitude.
- High level of organization, accuracy, and attention to detail.
- Ability to work independently and manage multiple clients.
- Ability to communicate complex financial topics in a simple and understandable manner.
- Embraces personal development and feedback; not just coachable, but has a desire for coaching.
- Ability to flex time to more than 40 hours weekly during tax season, offset by time off after tax season.

Experience/Technical Qualifications

- CPA designation.
- 3+ years of experience in tax preparation and planning.
- Strong knowledge of tax legislation and compliance.
- Highly analytical and proficient in Microsoft Excel.
- Ability to make effective decisions using impeccable ethical judgment.

Compensation

- We benchmark our compensation and strive to pay above market given our small firm size and broad responsibilities.
- PWP's total compensation for this position ranges from $90K to $105K, in the first 1 – 2 years of the role, depending on experience and expertise, and would expand upward from there.

Application Process

If interested, please email a resume and cover letter to position@perspectivewealth.com and use "Tax Lead" in the subject line.

In the cover letter please describe why this position is of interest to you and how you'd be a great fit for leading PWP's tax preparation initiative.

Given the critical nature of who we are in the lives of our clients and the intention we use in crafting the culture of our firm, our hiring process will be rigorous, involving multiple interviews and considerable written communication. If you're up for this rigor, we look forward to hearing from you.