PERSPECTIVE
Wealth Partners

About You

Are you an accomplished, experienced tax professional who enjoys public accounting and client interaction but are tired of the long hours during tax season? Do you love saving your clients money but seldom have the time due to the sheer number of returns or an inability to recommend actions throughout the year?

Do you enjoy developing long-term client relationships rather than simply processing returns?

If you would like to assist in the development of a tax department in a thriving 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, that serves approximately 270 households with over $950MM in assets.

PWP offers clients a wealth management experience focused on achieving their financial goals and living meaningful lives.

In tandem with providing a first-rate wealth management experience, we are trusted thought-partners in non-financial areas to our clients.

As a fiduciary, PWP is legally obligated to provide investment portfolio management and financial planning that is in the client’s best interest. We are obsessive about optimizing after-tax returns for our clients. With multiple CPAs on staff, our clients rely on us for in-depth tax planning and analysis.

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 and benefits including salary and bonus, 401(k) matching, 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 Senior Tax Associate to assist in 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.

Core Responsibilities

- Assist with tax return preparation and planning for 75-90+ clients.
- Calculate quarterly estimates and withholding recommendations.
- Handle notices, audits, and amendments efficiently.
- Serve as a key resource regarding tax technology tools (currently using Axcess and Holistiplan).
- Provide regular updates on tax legislation and news to the 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.

Experience/Technical Qualifications

- CPA and/or EA designation or in pursuit of attaining either designation.
- 3+ years of experience in tax preparation and planning.
- Strong knowledge of tax legislation and compliance.
- Highly analytical and proficient in Microsoft Excel.

Compensation

- We benchmark our compensation to the industry and intentionally strive to pay above market. PWP's total compensation for this position ranges from $90K to $115K, in the first 1 – 2 years of the role, depending on experience and expertise, and raises based on role progression.

Application Process

- If interested, please email a resume and cover letter to position@perspectivewealth.com and use "Senior Tax Associate" 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 our team and culture.
- Given the critical nature of who we are in the lives of our clients, our hiring process will be rigorous, involving multiple interviews and considerable written communication. If you're up for the challenge, we look forward to hearing from you!

***Applications are due by August 15, 2026. Selected candidates will be invited to begin the interview process shortly thereafter.**