Tax Associate
Accepting applications until November 30th
Estimated Start Date: As soon as possible

PERSPECTIVE
Wealth Partners

Position Description
Our firm is searching for high-achieving applicants who wish to pursue a career in tax services, who also value developing deep client relationships without sacrificing a healthy work-life balance.

Our associates will work alongside all members of our team to complete meaningful tasks and projects. Areas of exposure include tax return preparation, understanding each client's unique needs to create individualized tax and estate plans, and regular direct client interaction.

Learning Opportunities and Responsibilities
- Assist with tax return preparation and planning for 75-90+ clients.
- Play an integral role in developing and expanding the firm's tax practice
- Gain hands-on experience with several tax and fintech solutions: CCH Axcess, CCH Prosystem fx Planning, Holistiplan, Orion, Redtail, and others.
- Enhance communication skills by being involved in internal and client meetings.
- Develop presentation abilities by creating and preparing materials for client and internal use.
- Strengthen your ability to connect with people by exposure to a team with vast knowledge and expertise in both tax and behavior finance.

Interpersonal Qualifications
- Excellent time and task management skills.
- Demonstrates initiative and finds ways to make tasks and processes more efficient.
- Positive energy and professional, upbeat attitude.
- Strong alignment with PWP's firm's vision and values.
- Process-oriented working style, focused on organization, accuracy, and attention to detail.
- Embraces personal development and feedback, not just coachable but has a desire for coaching.
- Ability to work and multi-task in a fast-paced, evolving environment – can pivot quickly.

Education/Technical Qualifications
- Pursuing a bachelor's degree in accounting. Minimum 3.5 GPA.
- Prior tax internship preferred, but not required
- Desire to pursue CPA designation.

Compensation
We benchmark compensation to market and strive to pay above market given our small firm size and broad responsibilities. PWP's total compensation for this position ranges from $65K to $85K, 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 "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 involve multiple interviews and written communication.