PERSPECTIVE
Wealth Partners

Tax Intern
Accepting applications until November 30th
Estimated Start – End Date: January 18th – April 15th

Position Description
Our Internship Program is designed to provide high-achieving applicants with real-world tax preparation, planning and client relations with an end goal of hiring successful interns into full-time positions.

Our interns 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.

This position is 30-40 hours/week throughout the duration of the internship with flexibility dependent on class load. Upon internship completion, there may be an opportunity to continue working part-time while continuing your education.

Learning Opportunities and Responsibilities
- Assist with tax return preparation and planning for 75-90+ clients.
- 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.
- Desire to pursue CPA designation.

Compensation
- $35/hour

Application Process
- If interested, please email a resume and cover letter to position@perspectivewealth.com and use "Tax Intern" 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.