**Job Title:** Tax-Focused Client Advisor

Summary / Objective Statement:

The Tax-Focused Client Advisor will provide direct, specific tax-focused planning advice to support client financial strategies. Using CPA qualifications and experience, the Tax-Focused Client Advisor will be a subject matter expert in tax-related matters.

The Tax-Focused Client Advisor role will support both current and prospective clients, as well as seek to grow the business through their own efforts to bring in client planning opportunities.

The Tax-Focused Advisor is an on-site role with opportunities for growth and career advancement.

Essential Functions:

- Provide client-specific tax expertise to facilitate financial planning strategies.
- Identify opportunities for client tax-planning efficiencies.
- Engage with and support current and prospective clients.
- Identify and engage future prospective clients.
- Support client tax filing actions as needed.
- Other duties as assigned.

Targeted Education & Experience:

- Bachelor's Degree & licensed CPA
- Series 65 License or willingness to attain.
- CERTIFIED FINANCIAL PLANNER™ or CFP® candidate is a plus, desire to achieve the marks supports advancement.

Preferred Skills & Competencies:

- Experience developing and presenting tax-efficient planning strategies.
- Keen attention to detail
- Proficient with Microsoft Office suite, especially Excel and PowerPoint.
- Ability to communicate effectively with clients and internal stakeholders across mediums.
- Ability to manage multiple projects/tasks and prioritize actions based on business needs.

Benefits:

- Competitive salaried position or Base Pay + Variable Comp on a client book
- Paid Holidays & 10 days PTO
- 401(k) available
- Post 1-year of employment, potential financial support towards the CFP® designation