



Let's build your future together!

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## **Tax Consultant – Full Time**

Jumet Financial is committed to providing our clients with well-informed, objective advice, and to create a disciplined framework within which financial decisions are made, implemented, and managed from generation to generation. Jumet Financial is seeking a highly efficient and detail-oriented individual with the same strong standards for the role of Tax Consultant with the potential to grow into a Tax Advisor. The position requires a high level of confidentiality and professionalism, excellent time and project management skills and the ability to manage multiple work streams (both internal and external) at once. The qualified candidate must show high regard for client needs and not only be efficient, but also build rapport with current clients and prospective clients. The individual will have a desire to continue their education and skill development toward managing and building a Tax Specialist Team.

### **Primary Duties and Responsibilities:**

- Assist Individuals or organizations with quarterly and annual, local and federal tax planning.
- Assist Financial advisors and clients in specific tax issues and resolving the issues.
- Assist with the communication and administrative duties involved in filing client taxes
- Deliver outstanding client service, relating to general client support and answering general questions about accounts as needed
- Participate in team meetings and support staff meetings – in particular those involving the ongoing development and support of the Tax Specialist Team.
- Review plan data to assure ongoing compliance and testing adherence
- Other assigned duties from management
- Assist Individual Advisors

### **Qualifications:**

- Associates or Bachelors degree in progress or in a finance/accounting related field and willingness to continue education towards certifications and/or advanced degrees
- Strong passion to work in and succeed in the financial industry
- Willingness to obtain various securities and insurance registrations (upon request)
- Excellent Computer skills (MS Word, Excel, PowerPoint, and Outlook)
- Excellent communication skills (spelling, grammar and proofreading) written skills and verbal skills
- Excellent organizational and time management skills
- Ability to prioritize and multi-task
- Ability to exercise confidentiality and discretion

Eligible candidates will be required to pass a thorough background check.

All qualified candidates should contact Mallory Romano at 814-525-7063 or email resumes to [mallory.romano@jumetfinancial.com](mailto:mallory.romano@jumetfinancial.com)