Jumet FINANCIAL

Let's build your future together!

621 7th Avenue, Beaver Falls, PA 15010
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724-384-8758

Tax Planning Associate – Full Time

Jumet Financial is committed to providing our clients with well-informed, personalized 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 Planning Associate with the potential to pursue a CPA and grow into a Tax Planning 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 advisor with quarterly and annual, local, state, and federal tax planning.
- Assist financial advisors and clients in the investigation and resolution of complex tax issues
- Assist with the communication and administrative duties involved in client's revising their taxes
- Participate in team meetings and support staff meetings – in particular, those involving the development and support of the Tax Planning Team.
- Keeping up to date with new tax laws and researching tax issues as applicable to clients' financial plans
- Assist individual advisors
- Deliver outstanding client service, relating to general client support and answering general questions about accounts
- Other assigned duties from management
- All Jumet Financial employees are required to help serve our community through initiatives planned by the Jumet Financial Team

Qualifications:

- Associates or bachelor's degree in progress or in a finance/accounting related field and willingness to continue education towards certifications and/or advanced degrees
- Willingness to obtain the Series 7 & 66 and other required registrations promptly to become an advisor
- Strong passion to work in and succeed in the financial industry
- 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 email resumes to careers@jumetfinancial.com