TAX PLANNING ASSOCIATE

FULL TIME

Jumet Financial is committed to providing our clients with well-informed, personalized advice and to creating 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 grow into a Tax Planning Officer role. The position requires a high level of confidentiality and professionalism, excellent time and project management skills, and the ability to manage multiple workstreams (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 and prospective clients. The individual should have a desire to continue their education and skill development toward managing and building a Tax Specialist Team.

Primary Duties and Responsibilities:

- Prepare and submit tax filings for clients of the firm, including federal and state income taxes, estate taxes, retiree taxes, and non-retiree taxes
- Deliver outstanding support to advisors and clients on tax-related issues, answering questions as needed
- Manage client tax document requests
- Manage conversion information requests
- Prepare year-end tax drivers
- Assist with W-4 elections
- Coordinate quarterly tax payments
- Maintain the tax advisor list for internal reference and to provide clients with tax advisor recommendations by region
- Assist clients in managing state and IRS tax notices
- Run year-end tax projections and preliminary tax filings
- Prepare corporate tax filings
- Manage business taxes and provide advice
- Provide firm-wide education on the tax landscape and new rules
- Coordinate with third-party tax providers for clients and the business as needed
- Participate in team meetings, particularly those involving the ongoing development and support of the Tax Planning Team
- Assist advisors in reviewing plan data to ensure ongoing compliance and testing adherence
- Perform other duties as assigned by management
- Help serve our community through firm-planned initiatives, as required of all Jumet Financial employees

Qualifications:

- Bachelor's degree in finance, accounting, or a related field, with a willingness to continue education toward certifications and/or advanced degrees in taxation, such as Enrolled Agent and/or CPA, as required by the firm
- Strong passion for working and succeeding in the financial industry
- Familiarity with ProConnect or similar tax software
- Excellent computer skills (MS Word, Excel, PowerPoint, and Outlook)
- Excellent written and verbal communication skills, including strong spelling, grammar, and proofreading abilities
- Excellent organizational and time management skills

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Eligible candidates will be required to obtain applicable clearances and pass a background check. All qualified candidates should email their resumes to **careers@jumetfinancial.com**