Tax Specialist/Advisor – Dougherty Wealth Advisers LLC

Dougherty Wealth Advisers LLC (DWA) helps individuals plan wisely for their financial future. We provide comprehensive financial planning services, tax management and investment advisory services to individuals and families. We integrate and implement tax planning with the financial planning process. Our tax planning specialists are available to provide advice on our client's personal tax situation, strategies for efficient management of their tax situation, and income tax return preparation. We are skilled in asking the right questions, listening, preparing our analysis, and clearly communicating our recommendations to help clients meet their financial goals.

Position Description

Are you a tax professional looking for an opportunity to serve high net worth clients? Do you also have an interest in providing advisory services or learning about financial planning and advising clients? DWA is looking for a tax professional with at least 3 years of personal income tax experience to join the team. For more experienced tax professionals, a part-time role could be considered. In this position, you will work with the Director and be involved in all aspects of the tax return preparation process and advisory services for our high net worth clients. Given the nature of this role, you will experience busier times around deadlines.

Essential duties and responsibilities include:

- Prepare, process and file tax returns for high net worth clients including individuals, trusts and pass through entities
- Provide individual tax compliance and advisory services for our high net worth clients
- Stay current on tax law changes and trends, including moderate to complex tax issues, by conducting independent research and by reviewing relevant tax publications.
- Familiarity with personal financial concepts and the desire to expand and grow knowledge in the area of financial planning.
- Support the Director in preparation of tax analysis, cash flow modeling and investment analysis.
- Communicate with internal team members, other advisers, and clients.

Qualifications Required:

- Bachelor's degree in Accounting, Finance or Business preferred
- EA or CPA preferred
- Minimum of 3 years of experience in personal income tax
- Strong Microsoft Excel and Word proficiency
- Comfortable with new technology
- Strong verbal, writing, and organizational skills
- Excellent attention to detail
- Ability to work independently and in teams
- Ability to multitask

90 South Seventh Street | Suite 4300 | Minneapolis, MN 55402 | Phone: 612.317.2099

Other Duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

We offer a comprehensive benefits package for employees and their families including medical and dental plan; 401k plan including company matching; firm funded life and disability insurance.

Qualified candidates should submit their resume to careers@doughertymarkets.com for consideration.

Equal Opportunity Employer Minorities/Women/Veterans/Disabled