



POSITION - Associate

LOCATION - Mayfield Heights, Ohio

Wellspring is an independent wealth management firm. We offer holistic financial services to high net worth individuals and families including investment advisory, income tax planning and compliance, financial and estate planning, risk management and other multi-family office services. We are seeking a confident, motivated, self-starter to join us. We seek to hire and develop employees who embody our standards of excellence. This position offers long-term career growth and a competitive compensation and benefits package.

ROLE SUMMARY

- Provide support to the Directors, Managers, and Senior Associates of the firm
- Assist in the preparation of Federal, State and Local individual, partnership, S-corporation, and trust income tax projections and returns
- Preparation of financial and investment deliverables including cash flow, net worth and estate plans
- Attend client meetings, as needed
- Interact with clients, custodians, and other third party professional providers as necessary in servicing clients' needs
- Assist with client communication, agendas, recaps, and recommendations
- Initiate continuous improvement through leverage of new or existing technology

EXPERIENCE AND EDUCATION

- Ideal candidate has 1 to 2 years tax and financial planning experience
- Bachelor Degree in Finance or Accounting
- Interest in pursuing the Certified Financial Planner or Certified Public Accountant designation

SKILLS AND COMPETENCIES

- Commitment to professional and client service excellence
- Strong verbal and written communication skills
- Detail and deadline oriented
- Strong proficiency with Excel and other programs in the Microsoft Suite of Products (Outlook, Word and PPT) as well as CRM
- Multi-tasking
- Flexibility
- Self-starter
- Team player

Contact: Laura Capuozzo, Director of Operations

lcapuozzo@wellspringadvisorsllc.com

5885 Landerbrook Drive, Suite 205

Cleveland, Ohio 44124