



POSITION – Senior Associate

LOCATION – Cleveland, OH

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 across multiple financial disciplines. We offer a competitive compensation and benefits package including long-term incentive compensation.

ROLE SUMMARY

- Assist in preparation and review of Federal, State and Local individual, partnership, S-corporation, and trust income tax projections and returns
- Preparation and review of financial and investment deliverables
- Execute a client service plan on complex engagements and work closely with the Directors in exceeding our client's expectations
- Engage in planned and impromptu financial conversations with clients
- Initiate continuous improvement through leverage of new or existing technology
- Manage workflow of associates and administrative staff in conjunction with Manager input

EXPERIENCE AND EDUCATION

- Ideal candidate has 5 to 7 years of tax and financial planning experience
- Investment experience preferred, but not required
- CPA or CFP (can be candidates of either designation as well)
- Individual and pass-through entity taxation experience preferred

SKILLS AND COMPETENCIES

- Committed to professional and client service excellence
- Superior verbal and written communication skills
- Strong time management 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 Client Service Management software; experience using eMoney Financial Planning Tool and/or investment performance platform is optimal
- Committed to company values
- Self-starter/Resourceful
- Analytical thinker
- Team Player
- Flexible; Ability to work remotely and in the office

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