clearstead

We are seeking a Sr. Planning Associate, Financial Planning and Tax at our downtown Cleveland, Ohio wealth management firm. This individual will use expertise in various areas of financial planning and tax to provide analytical support, consultation and advice for tax, financial planning and investment management services to clients and is involved in all aspects of planning and compliance for clients.

Position responsibilities:

- Communicates directly with clients to accumulate and analyze data to complete a variety of financial planning and tax projects for clients including trust and estate documents, gift tax returns and/or trust returns, net worth reports, trust summaries, trust flowcharts, cash flow analysis, and estate tax calculations
- Researches and models financial, estate, charitable and tax planning topics related to proposed or completed client transactions and offers analysis and recommendations.
- Participates in client meetings
- Trains and educates team members on trust and estate topics
- Support Managing Directors by providing innovative trust and estate planning techniques
- Interface with client attorneys to facilitate updates and review final documents
- Develops knowledge of all assigned clients through reading meeting notes, studying client files and completing tax and financial planning projects for those clients
- Develops a basic familiarity of the tools available to complete projects in a paperless environment
- Completes other duties as assigned

Essential skills and experience:

- Bachelor's degree in business administration, accounting, taxation, finance or related field
- JD, CFP or CPA or paralegal designation preferred
- CTFA, CTEP, AEP designations a plus
- 3-5 years' experience working for a wealth management firm or law firm
- Ability to organize and manage multiple priorities
- Strong computer proficiency (e.g. Word, Excel, Adobe, Prosystem, BNA and Outlook)
- Strong client orientation
- Excellent interpersonal and communication skills
- Strong team player
- Commitment to company values

Clearstead is committed to building a culturally diverse workforce and strongly encourages applications from minorities and women.

We are an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, national origin, disability status, protected veteran status or any other characteristic protected by law.

Interested applicants can apply online at https://www.clearstead.com/careers/

The qualified candidate can expect:

- A flat, bureaucracy-free organizational structure that fosters creative thinking and involvement at all levels of the organization
- The opportunity to join a growing employee-owned firm that offers professional growth in an industry that is both dynamic and intellectually challenging
- An opportunity to work with high-profile private clients and institutions across the country
- A competitive base salary with an incentive bonus program
- 401(k) Savings plan with company contributions
- Health, Dental, Vision, and Long-term disability insurances
- Generous paid time off program

We are Clearstead…an independent institutional and wealth advisory firm in Cleveland, Ohio.

We advise nearly 120 institutions and 500 private clients on more than $20 billion of assets. Our institutional clients include retirement funds, endowments and foundations, and healthcare organizations. Our private clients are families, individuals, and related entities.

Our firm was established in 1989 and is owned 100% by its professionals and Board of Directors. Our only source of revenue is fees paid by our clients for financial advice. We are not affiliated with any firm, nor do we receive revenue from any source that impairs our ability to provide objective advice.

Our independence assures our clients of top quality, objective service, in our investment, tax, estate, and financial advice. Our independence also helps us attract and retain top people.