

Tax and Financial Planning Support

I'm looking for an experienced tax professional to support my growing tax & financial planning practices. Could be a short-term assignment or longer-term relationship, depending on fit and mutual interest. Beyond tax support, the role could grow to encompass paraplanning, marketing support, technology support etc. depending on your strengths and interests. The role will likely be limited to tax work through the end of tax season (May 2021).

I have two sister companies, Soaring Wealth LLC and Steuern & Taxes LLC, providing comprehensive financial planning, tax, and investment management services. Founded in November 2018, I work primarily with corporate executives with significant equity compensation and US expats and foreign nationals currently in the US.

www.soaring-wealth.com

www.steuernandtaxes.com

Working Conditions

100% virtual, flexible hours

Est. 20+ hours per week, depending on your availability, agreed-upon responsibilities, and client workflow

Must have

Focus on cybersecurity

Experience working virtually successfully

Minimum 3 years of individual tax preparation experience

Very detail- and process-oriented

Proactive, responsive and extremely reliable

Ability to step back and look at the big picture

Ability to work independently

Nice to have

EA/CPA and/or CFP

Experience working with ProConnect and BNA

Experience preparing tax returns for expats and foreign nationals

Experience preparing partnership, S-corp and trust income tax returns

Familiarity with stock compensation (RSUs, ISOs and NQSOs)

Love for technology and processes

Minimum Tasks

Organize client documents

Prepare logically organized PDF and Excel-based workpapers

Draft tax returns in ProConnect requiring minimal review

Prepare tax projections in BNA

Draft emails to clients to address technical questions and follow up for missing information

Next Steps

If interested, email a resume and cover letter to service@steuernandtaxes.com.

Please address the following questions:

1. Why you would be a good fit for this position
2. What your desired role would be, if interested in a long-term position
3. What your availability is for the next four months
4. What continuing education you completed last year
5. Desired hourly rate