

Rehmann Wealth seeks a tax professional with a drive to build on their current expertise and learn to provide holistic personal financial planning advice. This personable candidate will provide cross-disciplinary financial advice as part of a team of experts. You will assist in tax compliance and planning and provide tax-focused financial planning which includes retirement/cash flow forecasting, estate planning, executive compensation, insurance analysis, and investment advisory.

The ideal successful candidate will have 2-5 years of individual and/or business tax return experience, CPA designation (progressing towards) or JD in tax related field, familiarity with trust and estate taxation, and the ability to prepare, review, and be responsible for tax returns that can be filed without extensive additional review.

The ideal person will be a:

- CPA designation (progressing towards) and/or JD in tax related field working at an advisory, accounting or law firm with 2-5 years' experience serving mid-to-high net worth and/or business owning clients
- Have familiarity with trust and estate taxation
- The ability to prepare, review, and be responsible for tax returns that can be filed without extensive additional review.
- Possessing the CFP® designation is highly desirable but not required. Candidates holding the CPA designation will be incentivized to take the CFP® exam through the accelerated/challenge path.

Are You the Right Fit?

You're our ideal candidate if:

- You know that financial health is just as important as physical health and possess a passion for helping people stay financially healthy.
- You're a talented problem-solver and communicator. You actively seek opportunities to take on challenges and develop viable solutions.
- You're curious.
- You can think on your feet.
- You're a team player who loves to compete and win as part of a team.
- You're committed to your professional growth.
- You enjoy thinking outside of the box and working with others to find solutions to complex situations.