

FINANCIAL PROFESSIONAL

Be a part of a team behind our success.

Baker Schultz Tax and Financial, LLC is a financial and tax planning firm that takes a holistic approach to financial and investment planning, integrating income tax planning and preparation.

Location: 351 Prairie Heights Dr, Verona, WI 53593

Start Date: TBD

Full-Time

Summary

The professional in this position will provide financial planning, including investment, cash flow management, research and analysis, portfolio construction and monitoring, retirement planning, etc. Experience in tax planning and preparation is preferred.

Responsibilities

- Meeting individually with clients to determine their financial objectives, risk tolerance, income, expenses and assets.
- Preparing financial planning documents, such as needs analysis, income projections and investment reports.
- Understand tax impacts of investments.
- Development and analysis of model portfolios.
- Maintaining compliance with all rules and regulations in the financial industry.

Qualifications

- Experience in the financial industry.
- FINRA registered.
- Continuously exhibits personal integrity and professional initiative.
- Reliable, follows through on commitments, self-starter when it comes to new challenges.
- Must be organized, detail-oriented and able to manage and prioritize tasks.
- Demonstrates a commitment to accuracy by delivering high quality work.
- Excellent communication skills, verbal and written.
- Collaborative and able to work effectively with others.
- Proficiency in Microsoft Office.

Benefits

- Commitment to mentorship, training, education, and career development.
- Competitive salary based on experience.
- 401(k) plan with matching contribution.
- Health Insurance.
- Company paid holidays.
- Paid training and professional memberships.