

TAX 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 tax preparation and planning services to new and existing clients. Potential growth in the financial services area.

Responsibilities

- Recruit and retain new tax client base.
- Schedule and meet with tax clients during tax season to gather and review data necessary for accurate tax return preparation.
- Prepare accurate and timely client personal and/or business tax returns.
- Review completed tax returns with clients and suggest ways on minimizing future taxes.
- Provide clients with ongoing tax planning whenever necessary.
- Review other tax professionals completed returns for accuracy.

Qualifications

- Knowledge and experience with tax planning and preparation.
- CPA or EA.
- 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.