LANDMARK
WEALTH MANAGEMENT

DIRECTOR OF TAX AND WEALTH PLANNING

JOB DESCRIPTION

Landmark Wealth Management, an SEC-registered investment advisory firm, located in Amherst, New York, is seeking to fill a ***Director of Tax and Wealth Planning*** position. Candidates for the position should have a Bachelor's or Master's Degree, preferably in accounting and have a Certified Public Accountant (CPA) license, or JD.

Candidates must have a demonstrated hands-on approach and success in working in a team-based environment with strong analytical, presentational, and communication skills. The candidate needs to possess the ability to work well in a team environment and on an individual basis at times. They must be proficient in Excel, PowerPoint, Outlook and Word, with experience using a tax accounting-related software such as Intuit, ProSeries, Drake Tax, Bloomberg Tax (Income Tax Planner), CCH, or similar systems. Attention to detail and task management are a must.

The responsibilities of this position include, but are not limited to, the following:

Professional Requirements & Responsibilities / Client Interaction

- Preferred 4-7+ years of experience in the field of individual taxation, flow-through entities (S-Corps, Partnerships, LLC's) and/or estate, trust and wealth planning, and taxation. A thorough understanding of federal and state personal income tax is required.

- Responsible for all tax compliance duties of Landmark Tax Advisors, including the analysis, preparation, and filing of Individual and Small Business Tax returns (S Corporations & Partnerships), Estate and Gift tax compliance, and other tax reporting needs such as 1099, sales and use, household employees, etc.

- Technical planning and advising of clients that include private entities (S-Corp and Partnerships) as well as high-wealth individuals with the preparation of tax projections and developments of strategic tax-related plans.

- Assistance with financial planning projects for clients.

- Assistance with client audits of federal and state income tax, or notices received.

- Organizing, coordinating, and assembling of materials for tax and financial planning meetings. Translating complex data from a range of sources into client-ready deliverables.

- Building effective long-term relationships with our clients, while understanding their unique needs to provide a tailored service.

- Directly communicating complex tax issues to clients and non-tax professionals.

- Executive presence and business development skills with experience in coaching and mentoring junior colleagues with a commitment to continued learning through additional certifications and CE in tax and wealth planning.

- The ability to adapt your work style to work with internal, external, and assigned client team members.

- As needed, interaction and assistance with our strategic CPA partner, Chiampou Travis Besaw & Kershner LLP (CTBK), including coordination of joint projects with CTBK.

Operational & Development Responsibilities

- Development and maintenance of internal operational support systems, including client database, and client archive support system as it pertains to tax clients

- Working in coordination with financial custodian and other third-party service providers to resolve client service issues (i.e. setting up estimated tax payment schedules, etc.)

- Identifying and reacting to risks and opportunities to improve our tax services, processes, and growing the overall tax practice

We're interested in tax professionals with a genuine interest in providing tailored services to the Landmark Wealth Management client base. Working with people from all backgrounds, from executives to owners and their families, your experience as a trusted advisor will be used to maintain and further our reputation for excellence. This is not an exhaustive list, and we would expect this position to grow and evolve as our firm continues to develop over many years.

Pay will be competitive and commensurate with a candidate's experience and qualifications. Benefits include healthcare, dental, vision, short-term disability, long-term disability, 401k plan with employer contribution, and continuing education. This is a full-time position, with a flexible starting date.

Resumes should be submitted via email (preferable) or hardcopy as follows:

Email: Brian@landmarkfirm.com

Landmark Wealth Management
Attention: Brian Laible, Managing Partner
2410 North Forest Road, Suite 101
Getzville, New York 14068