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Position: Associate – Tax

Company Profile:

Southern Wealth Management, LLP is a multi-family office serving high net worth families and individuals. We were established in 2005 and are headquartered in San Antonio, Texas with additional offices located in Dallas and Midland, Texas, and New Orleans, Louisiana.

Job Description:

Our company is looking for a qualified **Associate** tax professional able to service our high net worth clients' complex tax needs. The candidate **must be a professional who understands the responsibility of dealing with sensitive and confidential data.** The candidate will need to possess highly complex problem-solving skills while performing various accounting analyses. This position will report to the Tax Management Team.

Education, Certifications and Experience:

- A minimum of a Bachelors' degree in Accounting.
- CPA license or actively pursuing a CPA license preferred.
- Zero to Three (0-3) years of experience working in the business/finance industry or related marketplace is preferred.
- Proficient using the Microsoft Office suite particularly Excel, Outlook, and Word.
- Ability to work extensively with databases, spreadsheets, financial/legal documents, and files.

Job Responsibilities:

- Prepare tax returns, compute tax liabilities, and ensure compliance with timely payment, reporting and other tax requirements.
- Prepare, examine, and analyze accounting records, financial statements or financial reports for accuracy, completeness and conformance to reporting and procedural standards.
- Perform tax research and consultation regarding complex tax issues.
- Maintain active communication with multi-disciplinary teams to manage expectations and ensure client satisfaction.



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Must have Attributes/Attitude/Aptitude:

- Self-starter that desires to take initiative.
- Acceptance of our core values: Clients first, Ownership, Result oriented, Accurate, Teamwork, and Hustle & Humility.
- Ability to work well on a team or autonomously.
- Excellent interpersonal skills.
- Strong verbal and written communication skills.
- Ability to organize, prioritize, and manage multiple tasks within set deadlines.

Physical Requirements:

- Must be able to lift 25 lbs.
- Must be able to sit or stand for 8 – 10 hours.

I have read and understand the duties, responsibilities and qualifications of this position and acknowledge that I can perform the essential functions of the job with or without an accommodation. I also understand that this is a summary of this position's duties and other responsibilities may be assigned as the company deems necessary.

Southern Wealth Management, LLP is committed to hiring and retaining a talented diverse workforce. We are proud to be an Equal Opportunity / Affirmative Action Employer, making decisions without regard to race, gender, gender identity or expression, sexual orientations, national origins, disability status, age, marital status or protected veteran class.