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**Position:** Associate Senior – Tax (Salary commensurate with experience, plus discretionary bonus; general salary range for this position is \$70,000 - \$80,000 annually)

### ***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 **Senior level** tax professional able to service our high-net-worth clients' complex tax needs. This individual will recommend financial actions by analyzing accounting options, reconcile financial discrepancies by collecting account information and auditing the documents. 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 analyzes. This position will report to the Tax Manager.

### ***Education, Certifications and Experience:***

- A minimum of a Bachelors' degree in Accounting, preferably a Masters' degree in Accounting.
- Three (3) years or more experience working in the business/finance industry or related marketplace is preferred. A CPA designation is highly desirable.
- 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:***

- Managing and overseeing the work of Associate level tax staff.
- Preparing, examining, and analyzing accounting records, financial statements or financial reports for accuracy, completeness and conformance to reporting and procedural standards.
- Ensure that financial records comply with IRS laws and regulations.
- Participate in tax planning meetings of high-net-worth families and individuals.
- Perform tax research and consultation regarding complex tax issues.
- Compute taxes owed, prepare tax returns and ensure compliance with timely payment, reporting and other tax requirements.



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- Provide internal and external auditing services.

### ***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.*