Tax Professional

Overview

A growing **wealth management firm** is expanding its service offerings by building a dedicated **tax advisory practice**. They are seeking a **CPA with 2+ years of public accounting experience**—ideally someone who is ready for a change from long hours, heavy seasonal workloads, and repetitive tax cycles.

This is a unique opportunity to help build a tax practice from the ground up while working alongside financial advisors to deliver comprehensive planning for high-net-worth individuals, mid-career professionals, business owners, and families.

What Makes This Role Attractive

- A chance to **step out of traditional public accounting** and help shape a new tax services division.
- Direct involvement in **developing the brand, identity, and client experience** for the tax practice.
- A more balanced lifestyle with **predictable hours** and a strong emphasis on long-term client relationships rather than volume-driven tax seasons.
- Exposure to **vesting schedules, real estate and alternative investments, equity compensation**, and other wealth-management-aligned tax strategies.
- Competitive compensation in the **$110K–$130K** range.

Ideal Background

- CPA with **2–5 years** in public accounting
- Strong tax preparation and advisory foundation
- Experience with **corporate stock filings**, equity vesting, or high-net-worth clients
- Someone who enjoys tax work but wants a **more strategic, client-facing role**
- Interest in helping build and define a **new service line** within a respected wealth management brand

Send Resumes and Cover Letter to info@shermanwealth.com