



We are seeking a **Tax Senior Accountant** in the Private Client Group of our wealth management firm. The candidate will use their experience in tax to review partnership and S-Corp returns, bookkeeping, payroll and bill paying and to provide consultation.

In this position you will:

- Be responsible for reviewing year-round deliverables (business tax returns, entity tax projections, bookkeeping, payroll, bill pay and special projects)
- Monitor logs for year-round deliverables
- Communicate directly with clients and other professional advisors as needed
- Conduct research on tax matters and make recommendations
- Participate in client meetings as needed
- Develop specific expertise in several areas of tax and consulting
- Develop skills to use the tools available to complete projects in a paperless environment
- Complete other duties as assigned

The successful candidate will have:

- At least 4 years of experience with business returns, including 2 years of review experience
- Bachelor's degree in business administration, accounting, taxation, finance or related field
- CPA designation preferred
- Ability to organize and manage multiple priorities
- Excellent computer proficiency (e.g. Tax preparation software, QuickBooks, and Adobe acrobat)
- Excellent interpersonal and communication skills
- Team player mentality
- Commitment to company values

Clearstead is committed to building a culturally diverse workforce and strongly encourages applications from minorities and women.



We are an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, national origin, disability status, protected veteran status or any other characteristic protected by law.

The qualified candidate can expect:

- A flat, bureaucracy-free organizational structure that fosters creative thinking and involvement at all levels of the organization
- The opportunity to join a growing employee-owned firm that offers professional growth in an industry that is both dynamic and intellectually challenging
- An opportunity to work with high-profile private clients and institutions across the country
- A competitive base salary with an incentive bonus program
- 401(k) Savings plan with company contributions
- Health, Dental, Vision, and Long-term disability insurances
- Generous paid time off program

Interested applicants should send their resume and salary requirements to jbattes@clearstead.com.

We are Clearstead...an independent institutional and wealth advisory firm in Cleveland, Ohio.

We advise nearly 120 institutions and 500 private clients on more than \$20 billion of assets. Our institutional clients include [retirement funds](#), [endowments and foundations](#), and [healthcare organizations](#). Our private clients are families, individuals, and related entities.

Our firm was established in 1989 and is owned 100% by its professionals and Board of Directors. Our only source of revenue is fees paid by our clients for financial advice. We are not affiliated with any firm, nor do we receive revenue from any source that impairs our ability to provide objective advice.

Our independence assures our clients of top quality, objective service, in our investment, tax, estate, and financial advice. Our independence also helps us attract and retain top people.