Reed
FINANCIAL SERVICES
A Registered Investment Advisor

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Senior Technical Support Specialist

Description

Growing Eastside Cleveland, Ohio RIA looking for an experienced Financial Advisor or similar professional experience with a focus in Tax and Estate Planning to service existing clients. The ideal candidate would hold a CPA/PFS, CFP and/or JD credential and have a minimum of 10 years of tax and estate planning experience.

We strive to serve our clients' best interests by working to understand their real needs and concerns and then personalize approaches to address those needs. Individual income tax planning is an integral part of personal financial planning and the firm is looking for a Financial Advisor with a deep background in tax and estate planning to support our internal team and clients.

The ideal candidate will be able to demonstrate self-motivation, ambition, a strong work ethic, be able to think well on their feet and be able to provide examples of developing rapport with clients. The position necessitates tremendous organizational skills, excellent attention to detail and the ability to provide sound advice on topics in a clear, articulate manner. This position works in tandem with members of our client's external planning team including accountants, attorneys and other professionals and assists in keeping our internal team apprised of recent tax and financial planning legislation and related developments, including new planning ideas that meet the needs of our clients. It is a fast-paced work environment, which offers an exceptional opportunity for individuals who complement our dedicated and collaborative working environment.

Qualifications

- Minimum of 10 years of planning experience in retirement, estate, education and tax.
- Excellent interpersonal/communication and organizational skills
- Detail oriented, strong analytical/problem solving skills, ability to work in a team
- Ability to work in a fast-paced professional environment with heavy customer interaction
- Ability to manage and resolve difficult situations with clients
- Strong computer skills with proficiency in Word, Excel, PowerPoint and Outlook. Experience in Salesforce based CRM, Pershing's NetX360 and Envestnet's Tamarac Portfolio Accounting systems are a plus.
- Strict compliance and adherence to all regulations and policies
- Bachelor's Degree Required
- CPA/PFS and/or CFP licenses preferred

For consideration, please send your cover letter and resume to hr@reed-financial.com.