



## WEALTH PLANNING TAX STRATEGIST

### Job Posting

#### Position Summary:

The Wealth Planning Tax Strategist is responsible for facilitating the delivery of Stockman Kast Ryan + Co services to high net-worth individuals and families to develop and tailor comprehensive estate and income tax solutions in the Colorado Springs & Denver markets.

#### Starting Salary Range:

\$115,000 – \$130,000

#### Education Required:

- Bachelor's degree in Finance or related field
- MBA, CPA or JD Preferred
- Minimum 8 years progressive experience of wealth planning experience working with high-net-worth individuals and families

#### Duties + Responsibilities:

- Advise high net-worth clients on a full spectrum of tax services including wealth transfer, charitable and retirement planning, and tax compliance
- Participate in prospective client proposals and intentionally plan to build new client relationships
- Actively assist in identification of opportunities to expand business opportunities
- Develops a thorough understanding of needs, goals, and financial position to help clients strategize in a clear and supportive manner
- Maintain professional standards through an in-depth understanding of capital markets, financial and estate planning, banking, and industry trends that impact clients
- Analyze overall personal financial condition including complex retirement plans, estate plans & documents, investments, taxes, insurance, cash flow, cash management and budgets
- Review complex gift and estate tax returns.
- Conduct internal and external speaking engagements to educate employees and both current & prospective clients on wealth planning strategies
- Deliver exceptional client experience by building collaborative teams and mentoring team members

#### Technologies:

- Proficient with Microsoft Excel, Word, Outlook and Adobe Reader/Pro

#### Competencies:

- Ability to maintain a high level of accuracy and confidentiality
- Excellent written communication skills including strong spelling and grammar



- Excellent verbal and interpersonal communication skills and present a professional image
- Must be organized and can set priorities and meet deadlines while working independently

**Work Environment:**

Primary work location is an office environment with considerable time spent at a desk viewing a computer monitor. Workspace is relatively free from unpleasant environmental conditions, noise or hazards.

**Physical Demands:**

Primarily sedentary, lifting up-to 10 pounds regularly. Continuously requires vision, hearing, talking, and keyboarding. Frequently requires multi-tasking, working closely with team members, fine dexterity for repetitive, detail-oriented work. Occasionally requires time pressures, frequent changes of tasks, moving between workspaces or meeting rooms, carrying, reaching, and bending or crouching.

**Disclaimer:**

The above is intended to describe the general content of the requirements for the performance of this job. It is not to be constructed as an exhaustive statement of essential functions, responsibilities or requirements.

**How to apply:**

If this sounds like the opportunity you have been searching for, we would love the opportunity to connect.

Learn more about SKR+CO at [skrco.com](http://skrco.com).