



## Tax Manager – Cincinnati, OH

Foster & Motley, Inc. is seeking a Tax Manager to join its team. We are an independent, employee-owned, fee-only wealth management firm that provides clients with comprehensive financial planning and investment management, with a focus on tax planning throughout the year. We also prepare tax returns for a number of clients and are looking to expand this service offering. We manage \$1.4 Billion in client assets, have 36 dedicated employees and were named a finalist of the Cincinnati Business Courier's Best Places to Work in 2018. The culture of the firm promotes collaboration, professional growth, and a commitment to providing exceptional client service. This is a full-time position located in Cincinnati, Ohio.

### Responsibilities:

- Review and sign individual income tax returns for F&M's wealth management clients, with high attention to detail
- Oversee the implementation of the strategic plan for F&M's tax practice
- Manage and instruct seasonal tax preparers
- Throughout the year, assist financial advisors with tax projections and research
- Respond to notices from the IRS and other tax authorities
- Maintain a "client-first" service mentality

### Qualifications:

- CPA required
- 5+ years of experience in preparing and reviewing individual tax returns
- Strong knowledge of tax reporting for investment income including partnership flow-through items, multi-state returns, and tax basis calculations
- Strong tax research skills
- High level of comfort with technology and utilizing electronic tax workpapers.
- Proficiency in CCH Axcess/ProSystem FX and BNA Income Tax Planner preferred
- Experience with trusts and small business tax returns preferred but not required
- Team player, able to work well with all levels of the firm and with clients
- Excellent written and verbal communication skills

### What we offer:

1. Collaborative work environment where you can make a difference in the lives of our clients
2. Competitive salary commensurate with experience
3. Annual profitability/performance bonus
4. Safe Harbor 401(k) plan with discretionary profit sharing
5. Medical, Short-Term/Long-Term Disability and Group Life insurance
6. Paid vacation
7. Opportunities for professional growth and continuing education

If interested, please email resume to [careers@fosterandmotley.com](mailto:careers@fosterandmotley.com). All inquiries will be held in the strictest confidence.

# Foster & Motley

FOSTERING LIFE'S WEALTH

## Administrative Assistant, Cincinnati, OH (Title: Client Service Assistant)

We are a fee-only wealth management firm. Our mission is to assist clients in achieving their financial goals. We provide comprehensive financial planning and ongoing investment management. Our hallmark is a highly personalized approach, focused on the unique goals and needs of each client. We offer direct personal service through our exceptionally well qualified, seasoned professionals. Our employees are highly experienced, service oriented, and scrupulously honest. Our compensation system is designed to guarantee employee focus is on the client, not "production" or internal competition.

### Position Summary:

Full time position assisting and supporting the Client Service Specialist Team with client related financial planning and investment management activities, including preparing documents and reports and addressing their administrative needs, while exercising a high degree of confidentiality and initiative.

### Essential Functions:

- Establish, prepare, and maintain a variety of electronic files, and documents.
- Maintain control of matters in progress and follow up to ensure actions are completed.
- Compile regular and special reports selecting data from various sources.
- Open, maintain and service client accounts.
- Draft correspondence.
- Make arrangements for meetings and conferences.
- Coordinate office functions with other departments.
- Perform other such duties as may be assigned.

### Knowledge, Skills, and Abilities:

- General knowledge of office protocol and procedures.
- Organized.
- Detail oriented.
- Ability to multi-task.
- Excellent communication skills - oral and written.
- Ability to work independently and within a team environment.
- Customer service mentality.
- Dependable, and personable.
- Ability to utilize computer programs effectively.

### Qualifications:

- College degree is preferred.
- Thorough knowledge of Microsoft applications; Word, Excel, Outlook is essential.
- Administrative experience - within the financial services industry is a plus.
- Experience with Customer Relationship Management (CRM) systems and Document Management Systems (DMS) is a plus.

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