**Position Announcement 4/26/23**

Southern Wealth Management in New Orleans is looking to hire a tax associate.

Company Profile:

Southern Wealth Management, LLP is an investment advisory firm serving high net worth

families and individuals. We were established in 2005 and are headquartered in San Antonio, Texas with additional offices located in Dallas and Midland, Texas and New Orleans, Louisiana.

Job Description:

Our company is looking for a qualified Associate tax professional able to service our high net worth clients’ complex tax needs. The candidate must be a professional who understands the

responsibility of dealing with sensitive and confidential data. The candidate will need to

possess highly complex problem-solving skills while performing various accounting analyses. This position will report to the Tax Management Team.

Education, Certifications and Experience:

 A minimum of a Bachelors’ degree in Accounting.

 CPA license or actively pursuing a CPA license preferred.

 Zero to Three (0-3) years of experience working in the business/finance industry or related

marketplace is preferred.

 Proficient using the Microsoft Office suite particularly Excel, Outlook, and Word.

 Ability to work extensively with databases, spreadsheets, financial/legal documents, and files.

Job Responsibilities:

 Prepare tax returns, compute tax liabilities, and ensure compliance with timely payment,

reporting and other tax requirements.

 Prepare, examine, and analyze accounting records, financial statements or financial reports for

accuracy, completeness and conformance to reporting and procedural standards.

 Perform tax research and consultation regarding complex tax issues.

 Maintain active communication with multi-disciplinary teams to manage expectations and

ensure client satisfaction.

Please email a resume to: Danielle Duplay

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