***UPDATED* - TAX PLANNING & STRATEGY SPECIALIST**

**The Investment Counsel Company (ICC)** is seeking qualified candidates to work with our existing and future clients for a tax planning and strategy specialist role with Nevada’s No. 1 ranked independent wealth advisory firm. ICC is the only wealth management firm in Nevada to be ranked nationally in the top 100 by the Wall Street Journal for over 10 years. **As a fiduciary, ICC provides guidance, perspective, and judgement and does not sell investment products. Therefore, this position does not require selling, prospecting responsibilities, or book of business.** For over 38 years our team has been a respected industry leader and innovator, managing over $2 billion in assets and earning recognition through a team culture that is uncompromising in client’s welfare, industry best practices, and ethical values.

At ICC, we challenge industry norms to help individuals, families, businesses, and institutions make better informed financial decisions while promoting employee work-life balance, continuous learning, and a collaborative team environment. Our mutual success enables us to give back generously to charitable causes across Nevada and beyond in both time and treasure.

**Overview:**

The **Tax Planning & Strategy Specialist** provides clients with comprehensive and strategic analysis, directions and detailed steps regarding the integration of their tax and wealth management decisions. The specialist delivers expert insight that fosters building long-term client relationships by growing, preserving, and transferring wealth effectively**. This position is an especially attractive career opportunity for a highly motivated professional seeking to leverage their tax and accounting** **experience by applying their knowledge to tax strategies within the wealth management industry**. The successful candidate will work under the mentorship of a nationally recognized wealth management leader with a tenured accounting and tax background alongside his team, which includes our Company’s Senior Tax Planning & Strategy Specialist, a seasoned CPA with deep expertise in tax and client-focused wealth management. The right candidate is eager to learn, excels in customer service, and thrives in a collaborative, team-oriented environment.

**Core Responsibilities:**

**Tax Planning & Strategy Expertise**

* Stay current on tax laws, regulations, strategies, and best practices.
* Conduct in-depth analysis and prepare planning recommendations for client reviews and prospective client meetings.
* Mentor and train team members on elemental and advanced tax strategies and their implementation.
* Educate clients on opportunity costs regarding alternative tax strategies.

**Client Relationship Management**

* Clearly articulate the firm’s perspective on current and emerging trends in investments, the economy, politics, tax policy, and estate planning.
* Demonstrate a strong grasp of financial markets while communicating complex financial, tax, and estate planning concepts into clear, actionable guidance for clients and prospects.
* Deliver client presentations on the integration and benefits of relative tax and wealth management decisions.
* Understand and document each client’s financial goals, preferences, values, and unique circumstances to help build, maintain, and strengthen client relationships.
* Collaborate closely with all team members to ensure seamless delivery of services and implementation of strategies.
* Maintain consistent, proactive communication with clients to enhance engagement.

**Business Development & Growth**

* Strengthens the Company’s reputation and value proposition by cultivating relationships with Centers of Influence (COIs).
* Participate in key market organizations and events to build presence and expand networks.

**Required Qualifications & Competencies**

* Certified Public Accountant (CPA) designation in good standing, with a strong tax background in individual, trust, and estate taxation.
* Demonstrated expertise in tax with the ability to communicate complex strategies in a clear, concise, and client-friendly manner.
* Proven commitment to fiduciary standards and maintaining the highest level of professionalism, discretion, and integrity.
* Commitment to ongoing professional development as a lifelong learner of tax and other related subject matter within wealth management.
* Strong presentation, writing, and interpersonal communication skills.
* Highly organized, detail-oriented, and self-motivated with the ability to work both independently and collaboratively.
* Able to work effectively in a team environment and eager to step in and assist with tasks proactively.
* Strong adherence to ongoing regulatory compliance, company policies, and procedures.

**Nationally Competitive and Comprehensive Compensation Package: Pay range from $200,000 to $250,000 plus potential bonus based on factors including experience, skills, relevant education, qualifications, certifications, and seniority. 401(k) with safe-harbor employer contribution, 100% immediate vesting. Fully paid health, dental, vision, and life insurance within 30 days of employment, along with other company benefits (and perks). Cover letter required with resume.**