



CPA Analyst

Fairport/Luma Wealth is looking for a CPA with a background in individual tax compliance who is interested in pursuing a career in personal financial planning. The CPA Analyst will be responsible for the preparation of client core deliverables, as well as tax compilation, planning and compliance.

Responsibilities and Duties

- Prepare client core deliverables including asset allocation, cash flow, balance sheet, tax planning, and forward looking financial planning
- Onboard clients to eMoney financial planning software
- Attend client meeting and present deliverables
- Serve as initial contact for client planning inquiries
- Compile complete and accurate tax files for outsourced client tax returns
- Serve as point of contact between the client and our CPA firm outsource partners in the preparation of client income tax returns, trust, and business tax returns
- Assist the tax staff to prepare in-house client tax returns and other tax-related projects
- Research tax questions
- Prepare tax projections

Qualifications and Skills

- Licensed CPA with 2-5 years of experience in tax compliance
- Working knowledge of Microsoft Excel
- Detail oriented
- Strong work ethic
- Enthusiastic learner
- Strong written and verbal communication skills
- Interest in personal financial planning

Submit your resume to Rachel Margulis at rachel.margulis@fairportasset.com. No phone calls, please.

With roots dating back to 1963, Fairport is a registered investment advisor that INSPIRES FAMILIES by providing comprehensive wealth management solutions. Our team of credentialed professionals have extensive experience in guiding corporate executives, business owners and women of wealth. We help our clients with life's transitions including succession, retirement and liquidity planning, marital/partnership changes or loss of a spouse. Luma Wealth Advisors is a division of Fairport that provides women with personalized wealth planning, experienced investment management, and a supportive, enriching community where they can learn, connect, and celebrate with other women. More information at www.FairportAsset.com and www.LumaWealth.com.