



We are seeking a **Tax Intern** in the Private Client Group of our wealth management firm located in our downtown Cleveland, Ohio office. The candidate will use their academic experience in tax to prepare tax returns, provide analytical support, and make payment recommendations for high-net-worth clients. This is a full-time, temporary role running from January – April, 2023 designed for an intern new to the industry.

In this position you will:

- Be responsible for preparation of deliverables during tax season (tax returns, tax projections)
- Communicate with teammates and other professional advisors as needed
- Conduct research on tax and financial planning topics and make recommendations
- Develop competency in several areas of tax
- Develop skills to use the tools available to complete projects in a paperless environment
- Complete other duties as assigned

The successful candidate will have:

- An academic background in business administration, accounting, taxation, finance or related field
- An aptitude for learning, especially in a fast paced environment
- A desire to one day pursue a CFP or CPA designation
- An interest in individual, partnership or trust income tax returns
- Ability to organize and manage multiple priorities
- Excellent computer proficiency (e.g. Word, Excel, Adobe, and Outlook)
- Strong client service orientation
- Excellent interpersonal and communication skills
- Team player mentality
- Commitment to company values

**Clearstead is committed to building a culturally diverse workforce and strongly encourages applications from people of all backgrounds.**

We are an equal opportunity-employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, national origin, disability status, protected veteran status or any other characteristic protected by law.



The qualified candidate can expect:

A flat, bureaucracy-free organizational structure that fosters creative thinking and involvement at all levels of the organization

The opportunity to join a growing employee-owned firm that offers professional growth in an industry that is both dynamic and intellectually challenging

An opportunity to work with high-profile private clients and institutions across the country

We are Clearstead...an independent institutional and wealth advisory firm in Cleveland, Ohio.

We advise nearly 200 institutions and 900 private clients on more than \$31.5 billion of assets. Our institutional clients include retirement funds, endowments and foundations, higher educational institutions, and healthcare organizations. Our private clients are families, individuals, and related entities.

There's a popular line at Clearstead, "There are no sharp elbows." There is a palpable sense of kindness and respect for one another; of doing what is right for clients and the firm. Our culture is collaborative and collegial and encourages sharing of information and ideas. This helps us attract and retain strong and motivated individuals.