# Wealth & Tax Strategist

FULL-TIME • TRUXTON WEALTH • NASHVILLE, TN

TRUXTON
WEALTH · FAMILY OFFICE · BANKING

## WHO WE ARE

Truxton is a premier provider of wealth, banking, and family office services for wealthy individuals, their families, and their business interests. Serving clients across the world, Truxton's vastly experienced team of professionals provides customized solutions to its clients' complex financial needs. Founded in 2004 in Nashville, Tennessee, Truxton upholds its original guiding principle: do the right thing. Truxton Trust Company is a subsidiary of financial holding company, Truxton Corporation (OTCPK: TRUX).

## MISSION STATEMENT

To do the right thing every day, putting our clients' interests first, with distinctive, comprehensive financial solutions that protect and promote client prosperity and quality of life.

## WHAT WE OFFER

- 401k + company match
- Medical, life, dental, vision insurance
- Paid federal holidays and vacation
- Employee assistance program (EAP)
- Support towards continued learning and industry certifications

## WHY YOU SHOULD WORK HERE

- Truxton is a highly profitable and growing company that has been recognized by American Banker as the 9th best community bank (top-ranking TN bank) based on 3-year ROAE
- Opportunities to grow your expertise, take on new challenges, and gain exposure to a wide range of sophisticated work
- Because we are a smaller company, you will have the opportunity to chart your own course and contribute to initiatives that go beyond your job title
- Opportunities for incentive bonuses through new business referral

## CONTACT

- careers@truxtontrust.com
- 615-515-1700
- 20 Burton Hills Blvd, Suite 200
  Nashville, TN 37215

APPLY NOW

## THE ROLE

The Wealth & Tax Strategist will join and assist a team of CPAs, collaborating with Truxton Wealth Advisors and Portfolio Managers to develop and implement advanced tax and wealth planning strategies for high income individuals, business owners and wealthy families. The Position will support our existing tax team with the preparation of tax returns for select Truxton Wealth clients and producing tax reporting deliverables for Truxton managed accounts. To be successful in this Position, the individual will need an understanding of tax, trust and estate laws and must be able to communicate that knowledge effectively to clients, prospective clients and the entire Truxton Wealth team.

## WHAT YOU WILL BE DOING

- Assisting the development and execution of strategies that use tax and estate planning expertise to grow and enhance the value proposition of our wealth management business
- Assisting in the development and oversight of estate planning execution, tax minimization and wealth transfer strategies
- Interacting proactively with clients and Truxton Wealth staff to gather information, resolve tax-related issues with the IRS and make tax recommendations
- Assisting the tax team in the management, review and filing of tax returns for individuals, trusts, foundations, corporations and partnerships including federal, foreign, state and local tax returns, estimated payments and extensions and Federal and State tax audits
- Reviewing outside prepared returns for current and prospective clients to discover planning opportunities, to develop a holistic perspective of the individual's financial state, and to ensure the returns are accurate
- Assisting in the management and oversight of Truxton Wealth internal tax reporting system (OneSource) and creation of Truxton Wealth Information Returns (1099, 1099R, 5498, etc.)
- Researching and consulting on various tax matters, utilizing tax-related software to prepare tax projections, tax returns, and research tax matters

## WHAT WE ARE LOOKING FOR

*Attributes and Abilities*

- Knowledge of trust, estate, and individual tax law, as well as fiduciary and estate tax planning
- Experience with high-net-worth individuals, S-corporations, C-corporations, partnerships, LLCs, trusts and private foundations is required with an emphasis on high-net-worth individuals,
- Delivery of distinctive and thoughtful client service in a manner that secures client confidence
- Demonstrates independent initiative, timeliness, and responsiveness
- Adoption of our culture of entrepreneurship and teamwork

*Experience and Skills*

- 4+ years of tax experience, including 1040's, 1041's, 706's, 709'3, 990's, etc.
- Proficient with Microsoft Office; experience with tax and accounting software

*Education and Designations*

- Bachelor's Degree in Accounting
- CPA Designation required
- Other professional Designations (CFP, CTFA, CFA, etc.) preferred