RADNOR
FINANCIAL ADVISORS

Job Posting: **Tax Associate (3-4 years)**

About Radnor Financial Advisors, LLC

Radnor Financial Advisors, LLC is an independent, fee-only, wealth management firm in the Philadelphia area. For over 30 years, Radnor has provided wealth management services to high net worth individuals and corporate executives. Our holistic approach integrates personal financial planning, tax considerations, estate concerns, and investment portfolio management. At Radnor, you can experience the benefits of personal wealth management. Our team of highly-qualified professionals comprehensive financial planning focused on the specific needs and circumstances of our clients – investment planning, estate planning, wealth transfer, retirement goals, tax planning, risk management (property and casualty insurance, life insurance, disability insurance) college planning, budgeting, benefits planning and more. We believe the best financial advice is provided by people who are independent and objective. For that reason, we function as a fee-based advisory firm and take care to maintain exclusive advisor-client relationships. We do not sell investment or insurance products and we do not accept commissions. We consider that we have a duty to always act in good faith, and to place our clients' interests first and foremost.

Tax Associate

Radnor Financial Advisors, LLC is looking for a Tax Associate with 3-4 years of experience to be part of our tax team.

Position Description

The position of Tax Associate is primarily responsible for tax preparation and compliance. The Tax Associate also works with the rest of the tax department to provide the highest level of customer service to our clients. The position Tax Associate reports directly to the Tax Manager.

Duties and Responsibilities:

Tax Preparation – The Tax Associate is expected to do the following:

- Prepare federal and state tax returns for individuals, trusts, and pass-through entities.

Tax Research and Correspondence – The Tax Associate is responsible for receipt of all incoming tax notices and tracking the progress of each notice. The Tax Associate is also expected to gather documentation for correspondence as needed.

Internal Communication/Reporting – The Tax Associate is accountable for the upwards communication to the Tax Manager and Tax Director for seasonal progress reporting (i.e. tax admin process work steps, return prep/completion, K-1 tracking, etc.).

Tax Planning – Assist the consultants and work to streamline/manager the processes for tax planning as described below:

- Estimated tax payments
- Required minimum distributions
- Qualified Charitable Distributions
- Tax Notices
- Miscellaneous tasks

Client Service – Working closely with consultants, planners, and financial support staff to provide direct support to clients in the following areas:

- Tax administration process
- Tax return preparation

- Tax projections, RMD analysis, QCDs, charitable gifting, etc.
- Tax analysis, planning and strategy
- Payroll Tax (i.e. forms W-2, W-3, 1099-MISC, Sched H, etc.)
- Partnership Accounting

Supervision Received and Exercised – The Tax Associate reports directly to the Tax Manager and Tax Director. Supervision is provided by the Tax Manager, but the position requires the ability to perform with minimum supervision.

Experience/Skills:

- Bachelor's degree required.
- EA/CPA preferred
- 3-4 years of tax preparation experience required
- Proficiency with Word, Excel, Access, Outlook, Internet
- Must be able to prioritize work; ensure daily deadlines are met; and work independently as needed.
- Ability to work independently. Strong organizational skills. Detail-oriented.
- Opportunity for long term relationship.

Compensation/Benefits: Compensation commensurate with requirements of the position plus attractive benefits.

To apply for the Tax Associate position, you must provide your cover letter, resume, and salary requirements to Ms. Vermillion at radnor@radnorfinancial.com for consideration.