

Join Our Growing Team!

POSITION: Tax Advisor/Tax Planning Professional (\$65,000-\$80,000)

Are you a detail-oriented tax adviser with a passion for numbers and a talent for individual tax preparation? Do you have 2 to 5 years of tax preparation experience and are looking for an exciting new challenge? If so, we would love to have you join our team at Klaas Financial. As a Registered Investment Advisory (RIA) firm, we are a forward-thinking Retirement Planning focused company dedicated to our clients' financial success.

Locations: Madison, WI or Loves Park, IL (Whichever location makes sense for you!)

Who Are We?

With 48 years of history, Klaas Financial has established itself as a trusted Retirement Planning Firm, dedicated to providing personalized financial solutions to a diverse clientele nationwide. Currently we serve over 1000 households and are adding new client households every year! Our offices in Madison, WI, and Loves Park, IL, are staffed with dedicated professionals who are committed to fostering a culture of excellence, innovation, and growth. Check out our website at Klaasfinancial.com to learn more about our team and our culture of excellence.

What is the Role You'll Have?

As a Tax Adviser with Klaas Financial you will play a critical role in shaping our clients' financial futures. Your primary focus will be on preparing individual taxes, ensuring compliance, and optimizing clients' financial strategies in alignment with their retirement planning goals alongside our team of advisers. This position offers a unique opportunity to blend your tax expertise with the dynamic field of retirement planning, providing a holistic service to our clients. **Let us handle the business side, so you can concentrate on what you do best.**

What We Offer:

Competitive Compensation: Attractive salary package commensurate with experience.

Benefits include:

- 401(k) + matching
- Bonus & Profit-Sharing Potential
- Employee assistance program
- Employee discount
- Health, Dental & Vision insurance
- Life & Disability insurance
- Holiday & Paid time off
- Flexible schedule

Professional Growth: The opportunity to help build out this important offering to our current and future Klaas clients from the ground up!

Dynamic Work Environment: Join a team of professionals who are passionate about making a difference in our clients' lives. Our supportive culture encourages collaboration, innovation, and continuous learning so that you can produce your best work!

Flexibility: We understand the importance of work-life balance and offer flexible working arrangements to accommodate our team members' needs.

Impact: Make a tangible difference in the lives of our clients, helping them navigate the complexities of financial planning and retirement with confidence and peace of mind.

Who You Are:

- Bachelor's degree in accounting or related program.
- An enrolled agent, or an accountant with 2-5 years of experience in individual tax preparation.
- Strong technology skills using Microsoft Office and various accounting software and research tools.
- Experience working in a paperless environment strongly preferred.
- Detail-oriented, with a strong analytical mindset and excellent problem-solving skills.
- Passion for helping individuals and families optimize tax planning efficiencies with income distribution strategies.
- Proficiency in understanding cash flow management and modeling.
- Experience with payroll management and financial reporting.
- Experience with QuickBooks.
- A team player who thrives in a collaborative environment but can also work independently when required.
- Committed to professional development and eager to expand your expertise in retirement planning.
- Excellent communication skills, with the ability to explain complex financial concepts in a clear and understandable manner.
- Excellent time management and organization skills.

How to Apply Confidentially:

If you're ready to take the next step in your career and join a team that's making a real difference in the world of retirement planning, we'd love to hear from you. Please apply with your resume and a cover letter outlining your experience and why you're the perfect fit for our team.

Join us at Klaas Financial where your expertise will allow you to focus on what you do best, while helping shape the financial futures of our clients across the country. Let's grow together!