

IPG Wealth Planner

Wealth Planner

The Wealth Planner plays a key role in developing, analyzing, and supporting comprehensive financial plans and tax strategy for our clients. In this role, you will work closely with our Financial Advisors to build thoughtful, planning led strategies that help clients meet their financial goals. This position is ideal for a detail-oriented planner with strong tax knowledge who enjoys collaborating with advisors and contributing to high quality, client-centered planning.

Responsibilities

- Prepare and support comprehensive financial plans, including:
 - Retirement projections and income planning
 - Education funding strategies
 - Estate planning considerations
 - Tax planning and optimization strategies
 - Risk management and insurance planning
- Prepare and file basic personal tax returns for clients
- Model planning scenarios to help advisors and clients understand tradeoffs and long-term outcomes
- Review and analyze client tax returns and financial data to identify tax-planning opportunities
- Support advisors with tax-efficient strategies, including:
 - Roth conversions and distribution strategies
 - Capital gains and loss harvesting
 - Charitable giving strategies (QCDs, DAFs, etc.)
 - Retirement account contribution and withdrawal planning
- Create clear, and accurate reports and presentations to communicate complex financial concepts
- Assist the planning team with meeting preparation and follow-up
- Monitor, update, input, and manage tasks and opportunities within Salesforce

Qualifications

- Bachelor's degree in Accounting and Finance
- 3+ years of Tax Planning
- Strong understanding of comprehensive financial planning concepts, investment strategies, tax implications, and estate planning
- Experience reviewing tax returns and applying tax concepts within financial plans
- Tax Certification, EA, Series 7 and Series 6 required or willing to obtain in 1st year
- Strong organizational and time management skills
- Ability to collaborate effectively in a team environment while also working independently