CLIENT TAX & STRATEGY MANAGER
ROLE DESCRIPTION

Role Title Client Tax & Strategy Manager
Reports To Chief Operations + Controls Officer

LVZ seeks a strategic and financially savvy professional who delivers extraordinary experiences through proactive guidance and a deep understanding of each client's unique tax implications. This role serves as a trusted advisor and financial professional, overseeing high-level accounting functions, driving financial clarity, and empowering confident decision-making in tandem with our financial planning team.

WHAT YOU'LL DO

- Prepare and File Client Taxes:
    - Accurately prepare and file federal, state, and local tax returns for individuals, trusts, and entities, ensuring compliance with current tax laws and leveraging opportunities for tax efficiency.
    - Serve as a resource for clients during tax season and throughout the year on related inquiries.
- Support Financial Planning Through Tax Integration:
    - Collaborate closely with the financial planning team to align tax filings with broader client goals, such as cash flow planning, charitable giving, and estate strategies.
    - Identify opportunities for proactive tax strategies that integrate seamlessly with long-term financial plans.
- Manage Post-Filing Follow-Up:
    - Own the post-filing process by tracking outstanding items, clarifying IRS/state correspondence, and communicating resolution steps to clients.
    - Proactively ensure clients are fully supported and any loose ends are addressed in a timely and thoughtful manner.
- Cross-Team Collaboration for Strategic Advisory:
    - Partner with tax, financial planning, and investment professionals to deliver a cohesive and strategic client experience.
    - Provide insights and recommendations that support sophisticated planning needs, such as tax-efficient investment strategies, Roth conversions, and multi-generational planning.
- Review and oversee accounting processes to ensure accuracy and compliance for the firm.
- Lead the development of budgets, forecasts, cash flow projections, and financial models
- Analyze financial data to deliver actionable insights and recommendations.
- Collaborate with business owners and executive teams to support decision-making.
- Prepare customized financial reports, dashboards, and performance summaries.
- Support clients through business transitions, including growth, funding, or exit strategies.
- Maintain clear, proactive communication with clients to build trust and long-term relationships.
- Ensure timely completion of client deliverables and follow-through on strategic initiatives.
- Support our trading team as a reliable back-up trader by executing trades with accuracy, maintaining compliance with firm protocols, and ensuring seamless continuity in trading operations during primary trader absences.

WHO WE WANT ON OUR TEAM

- Confident financial storyteller who can translate complex data into meaningful business insights.
- CPA in good standing with strong accounting fundamentals and a passion for strategic advisory work.
- Skilled in financial modeling, forecasting, and cash flow planning.
- Proactive problem-solver who anticipates client needs and offers thoughtful solutions.
- Experienced in managing multiple client relationships with poise and professionalism.
- Tech-savvy, with proficiency in accounting software (e.g., QuickBooks, Ultratax, Microsoft Excel, and dashboard tools).
- Communicates clearly and effectively with executives, business owners, and internal teams.
- Operates with a high level of integrity, discretion, and commitment to client success.
- Comfortable in a fast-paced environment, balancing accuracy with efficiency.
- Driven to create, improve, and streamline processes for lasting impact.

LVZ operates on five non-negotiables that define the culture of our team. You are the right culture fit if you...

- Foster a welcoming and respectful environment for team members and clients.
- Create extraordinary client experiences that exceed expectations.
- Operate on a foundation of integrity and clear communication.
- Pioneer new ideas and processes as a result of perpetual learning.
- Give generously of time, talents, and treasure to serve our communities.

ABOUT LVZ

Since our founding in 1960, LVZ has remained constant in our mission to deliver peace of mind for whatever comes next in every aspect of our firm. We started as a small firm that sold mutual funds - since then, we have expanded to manage multi-million-dollar portfolios and offer comprehensive financial planning services. Our firm has grown to over $900 million in assets under management across multiple independent broker-dealers.

Learn more about us at www.lvzinc.com.

Start Date	As soon as available (can be flexible)
Hours	Full Time
Salary	$95,000 - $120,000 annually
Benefits	Paid family health insurance, elected dental & vision Paid time off (128 hours accrued annually) 401(k) employer match + profit sharing Downtown Holland office
To Apply	Submit your resume, cover letter, as application for this role to hello@lvzinc.com, subject line: **'Client Tax & Strategy Manager – Applicant Name'**.