ROLE DESCRIPTION

Tax Intern

TEAM

Wealth Management

REPORTS TO

Client Tax & Strategy Manager

SUMMARY

We are looking for an accounting or finance student who wants to learn individual tax work alongside the professionals who practice it every day.

In this role you will support tax-season operations by organizing client tax documents, entering source data accurately, preparing straightforward individual returns under CPA supervision, and conducting first-pass reviews as your proficiency develops. Responsibility grows deliberately through the season, beginning with document organization during fall training and progressing to return preparation as filing season builds. You will work directly with our Client Tax & Strategy Manager and alongside our financial planning team, receiving coaching from experienced tax and planning professionals and seeing how tax information informs a client's broader financial plan. Success in this role looks like accurate, well-documented work delivered on deadline and an intern who finishes the season prepared for the next step in their career.

WHAT YOU'LL DO

- Organize and review client tax documents for completeness and accuracy, identifying missing items before preparation begins.
- Enter information from W-2s, 1099s, investment statements, retirement distributions, and other common source documents into our tax preparation software.
- Prepare straightforward federal and state individual tax returns under CPA supervision.

- Compare current-year information to prior-year returns and identify discrepancies, omissions, or items that warrant a closer look.
- Conduct first-pass reviews of straightforward returns as proficiency develops, escalating questions and potential tax considerations to the appropriate tax professional.
- Maintain accurate, organized workflows in our CRM so the team can track return status and meet filing deadlines.
- Protect confidential client information and follow established firm and tax procedures.

WHO WE WANT ON OUR TEAM

- Current college student pursuing accounting, finance, or a related degree, with an interest in taxation, financial planning, or CPA licensure.
- Introductory accounting coursework required; tax coursework preferred.
- Attentive to the smallest details; willing to identify errors and take steps to rectify issues.
- Organized and comfortable managing multiple assignments against firm deadlines.
- Professional, curious, and receptive to coaching and feedback.
- High level of integrity and discretion when handling confidential client information.
- Proficiency in Microsoft programs; familiarity with CRM systems is helpful. Experience with UltraTax or comparable tax software is welcome but not required.
- Welcoming persona that is respectful of a diverse spectrum of clients and colleagues.
- Availability to work increased hours per week throughout the tax season.

POSITION DETAILS

START DATE	Part-time training beginning in Q4 2026, with increased hours from January through April 2027
HOURS	Part-time during fall training; increased hours throughout filing season May be filled as one full-time seasonal position or two part-time positions
SALARY	\$17.50 – \$21.00 per hour, based on experience

OUR FIVE NON-NEGOTIABLES

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

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

ABOUT LVZ

Since our founding in 1960, LVZ has remained grounded in a singular purpose: delivering peace of mind for whatever comes next. What began as a small firm offering mutual funds has evolved alongside the lives and financial complexities of the people we serve.

Today, LVZ provides comprehensive financial planning and investment management, overseeing more than $1 billion in assets and serving clients through a nationwide network of advisor partners. While the depth of our capabilities and reach has grown, our commitment remains unchanged: thoughtful guidance, deeply personal relationships, and a coordinated approach to helping clients navigate the intersection of their lives and finances.

Learn more about us at www.lvzinc.com.

SUBMIT YOUR APPLICATION

Please submit your resume and a cover letter telling us why this role and our team are the right fit for you. Applications are reviewed as they arrive, and we will follow up with next steps.

lvzinc.com/join-our-team