

## SUMMARY

Howe & Rusling is a Registered Investment Advisory firm based in Rochester, NY with 90 years of experience and over \$1 billion in assets under management. While we ground ourselves in our long, rich history, the firm that exists today is one that continues to embrace the ever-evolving world around us. Our firm is owned and operated by its employees and is a proud veteran-owned and woman-owned business. Howe & Rusling strives to create and nurture a work environment that attracts the best talent and reflects our commitment to our clients, teammates, and community. And we're proud that as we've grown, our culture has remained centered around collaboration, camaraderie, and collective hard work for our clients and community.

Howe & Rusling is currently looking for a CPA to join our financial planning team. We are looking for an individual who will help us grow and evolve our existing planning model to make it a central part of our service offers by providing innovative accounting, tax planning, and consulting solutions to our high-net-worth clients. This individual should be passionate about helping clients identify and reach their financial goals and will be an essential member of the client's team. They will be partnered with a client service associate and portfolio manager to service a dedicated group of clients as well as assist as needed with prospective clients.

## RESPONSIBILITIES

- Develop, maintain, and manage the clients' financial plans.
- Prepare and review client special projects such as budgeting and cash flow projections.
- Prepare and review complex business and individual tax strategies.
- Perform financial statement compilations and reviews in conjunction with financial planning efforts.
- Provide exceptional proactive service to existing and prospective clients.
- Share financial markets insights, with an ability to explain complex financial concepts in a simple, repeatable manner.
- Collaborate with the portfolio management team and marketing department on various projects and product offerings.
- Participate in department/firm meetings, engaging colleagues across different areas, participate and lead working groups, sharing unique ideas, and participate in continuous mentoring.
- Engage in business development and ongoing client success.

## REQUIREMENTS

- Valid CPA license
- 4+ years of experience in accounting. Direct experience with a mix of individual & small business tax and audit knowledge is preferred.
- Passion for the financial markets
- Familiarity with planning software, such as eMoney, is preferred
- Exemplary written and oral communication skills
- Excellent interpersonal, planning, and organization skills

- Interest in pursuing additional professional designations such as CFP or CFA

## **BENEFITS**

- Medical, Dental, and Vision coverage
- 401(k) and profit sharing
- Attractive compensation package
- Education reimbursement for industry designation exams

Howe & Rusling is proud to be an Equal Opportunity and Affirmative Action Employer. We do not discriminate on the basis of any legally protected characteristics, including disabled and veteran status