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Estate Administration CPA/Paralegal

Description

Trust and Estate Practice Group

We are currently searching for highly motivated, team-orientated candidates interested in joining the largest DuPage County law firm as a Trust and Estate CPA/Paralegal. Tax background will be required for this role. The successful candidate will be organized, detail-oriented, possess excellent writing and numeric skills, maintain strict confidentiality, and display a passion for delivering outstanding results and service on a consistent basis.

Responsibilities

ESSENTIAL DUTIES & PERFORMANCE RESPONSIBILITIES

To perform this job successfully, an individual must be able to perform each of the following essentials promptly and accurately.

Specific tasks include:

Reviewing client estate planning documents for post-death administration of estates and trusts
Preparing trust and will summaries, inventories, accountings and spreadsheets
Preparing federal and state estate tax returns, gift tax returns and fiduciary income tax returns
Preparing client memos and correspondence
Funding marital and family trusts

Qualifications

ACQUIRED SKILLS & KNOWLEDGE

- Bachelor's degree in Accounting
- 5+ years of recent public accounting tax experience encompassing progressive scope and responsibilities
- CPA License or on track to obtain CPA
- Experience preparing IRS forms 706, 709, 1040, 1120, 1120S, 1065 and 1041
- Skillful attention to detail with strong communication, organizational, analytical, project management, client service and PC skills
- Proficiency with Microsoft applications including Outlook, Word, and Excel
- Strong verbal and written communication skills

Hiring organization

IV IT Solutions

Employment Type

Full-time

Job Location

Wheaton, ILLINOIS

Date posted

March 3, 2023