



**Company:** Lake Street Financial, LLC (“Lake Street”)

**Website:** [www.lakest.com](http://www.lakest.com)

**Location:** 128 N. May Street, Floor 2, Chicago, IL 60607

**Position:** Tax Manager

**Job Description:**

Lake Street is looking for an experienced tax professional with an entrepreneurial spirit to help launch “Lake Street Tax & Family Office Services” to complement our growing wealth management business. Lake Street is approaching \$1 billion in client assets under management, representing 400 households across 37 states. This individual will work jointly with the executive team to setup the infrastructure of this new division which will include sourcing technology and tax preparation software, setting pricing structures based on time and client demographics, identifying integrations with wealth management services, and establishment of an overall service model. Our goal is to introduce clients of Lake Street to the newly formed division and in subsequent years, purchase a book of business from a retiring tax professional. Our expectation is that the Tax Manager will not be responsible for business development initially, as their efforts will be focused on a successful launch. The Tax Manager position will be a full-time salaried role with competitive bonus opportunities and a comprehensive benefits package.

**Key Responsibilities:**

- Hire and oversee team of junior staff to support needs of a growing tax practice
- Refine and improve tax offering with continuous education and technical research
- Identify and consult on advantageous tax planning opportunities with wealth management clients
- Educate Lake Street advisors and their clients on changes to tax code and other relevant tax matters
- Work alongside the executive team to setup tax infrastructure including technology, pricing, and service models
- Prepare tax returns, estimated tax payments and other documents for existing and prospective wealth management clients

**Minimum Credentials:**

- CPA required
- Bachelor’s degree in accounting or finance (preferred)
- 5 Years of Tax Experience in planning & preparation of individual tax returns

**Candidate Requirements:**

- Strong written skills incorporating tax law research
- Quickly integrates into Lake Street’s culture of accountability, fairness, and teamwork
- Displays the ability to be self-driven and successful in an entrepreneurial environment
- Excellent interpersonal skills and experience communicating with clients and colleagues
- Demonstrates passion for understanding tax law and displays eagerness to develop knowledge set
- Experience managing multiple concurrent projects, meeting deadlines, and collaborating with multiple parties

**About Lake Street:** Lake Street is an SEC Registered Investment Adviser and full-service wealth management firm headquartered in Chicago, IL. Founded by former Merrill advisors, our firm offers investment management, financial planning and insurance services to private clients and institutions. Additionally, Lake Street offers aggregation and support services to advisors looking to make the jump to independence, as well as existing independent advisors looking for an upgraded platform. Our firm offers multiples formats which translate to each advisor’s unique practice including employee and independent contractor models, permanent and virtual office solution, multiple custodian platforms and hybrid RIA capability.

**Benefits:**

- Flexible Paid Time Off
- 401(k) & Profit Sharing
- Work from Home Options
- Dental, Health & Vision Insurance

Please reach out to Justin Terzo ([terzo@lakest.com](mailto:terzo@lakest.com)) or Joseph Stock ([stock@lakest.com](mailto:stock@lakest.com)) for more details.