



Tax Internship

Willis Johnson & Associates (WJA) is inviting one college Junior, Senior, or MBA candidate to explore the career of tax services within a Wealth Management firm. WJA is not a CPA firm, but is a Registered Investment Advisory firm. Our service to our clients is to provide a comprehensive financial plan for every stage of life, including vital tax planning and compliance. The tax intern will have the opportunity to explore tax planning and compliance from a broader point of view, being exposed to all stages of financial planning for high-net-worth individuals. This internship is ideal for a candidate who would ultimately like to pursue both a Certified Public Accountant (CPA) designation and a Certified Financial Planner (CFP) designation.

Our tax intern will be a vital part of our unique Protégé Program, wherein the intern will join our in-house CPA to receive technical training, one-on-one mentoring and networking opportunities. The tax intern participates in strategy sessions, client meetings, and takes the lead responsibility of one tax research project.

In 2019, WJA was voted by the Financial Times as one of the top U.S. Registered Investment Advisers. WJA is also listed as one of the fastest growing companies in Houston by the Houston Business Journal and one of the best places to work for financial advisers by Investment News.

Essential Responsibilities

- Learn preparation of individual and fiduciary income tax returns of wealth management clients
- Compile data for preparation of tax returns
- Create pdf of return packet for client delivery
- Input data into Thomson Reuters Ultra Tax preparation software
- Manage workflows, storage of data and returns through a paperless system
- Perform tax research using Thomson Reuters Checkpoint Edge
- Work closely with Tax Manager and wealth managers to provide outstanding service to clients
- Complete one specialized tax research project after tax season, including writing of the Research Memorandum

Qualifications

- Accounting major, emphasis in Tax, with a minimum GPA of 3.2
- Highly interested in a career in Public Accounting or Wealth Management
- Demonstrated track record of initiative
- Strong technology, research and organizational skills
- Enjoys research and analysis
- Confident, poised and professional in appearance
- Excellent written and verbal communication skills
- Capable of taking on creative challenges and tight deadlines

To Apply- Because we offer only one internship each year, we're looking for exceptional candidates. Our entire team participates in the intern selection process. To apply, please email your resume and cover letter to jobs@wjohansonassociates.com with your full name, followed by "Tax Internship" in the subject line.