



Palisades Hudson Financial Group LLC

200 S.W. First Avenue, Suite 1250 Fort Lauderdale, FL 33301

Full-Time Financial Planning Assistant Position Available

A thriving Fort Lauderdale based tax accounting and financial planning firm with an asset management affiliate is seeking a bright and responsible full-time financial planning assistant for our Atlanta, GA, office. Candidates who are invited for interviews will be seen in Atlanta or virtually.

Qualifications:

- Bookkeeping and/or accounting experience. Working knowledge of QuickBooks and Quicken software is a plus.
- Comfort with computers and knowledge of Excel and Word
- Good communication skills
- Excellent verbal and written skills in English. Facility with Spanish and/or Portuguese is a plus
- Hard-working and self-directing
- Attention to detail is imperative
- Strong quantitative skills

Responsibilities include:

- preparing income tax returns
- preparing monthly/quarterly bookkeeping for clients
- preparing quarterly payroll tax filings
- preparing annual trust accountings
- preparing brokerage account applications
- maintaining investment portfolio management program
- opportunity to research various asset classes for in-house investment committee meetings
- light company website posting and maintenance
- light administrative duties
- preparing correspondence for mailing
- answer telephones and direct calls and correspondence to appropriate personnel in multiple offices
- coordinating travel arrangements

Starting salary will be \$18-\$22/hr, depending upon experience and qualifications. Overtime is available plus bonus and profit sharing.

Please direct all inquiries to Melissa DiNapoli by email at melissa@palisadeshudson.com