



Palisades Hudson Financial Group LLC

3340 Peachtree Road NE, Suite 1545 Atlanta, GA 30326

Financial Planning and Tax Associate

Organization

Palisades Hudson Financial Group is a thriving tax accounting/financial planning firm with an asset management affiliate, Palisades Hudson Asset Management (PHAM). We are a fee-only organization offering a range of financial services to high net worth individuals. PHAM currently manages over \$1.7 billion in assets. Our offices are located in Stamford, Connecticut; Fort Lauderdale, Florida; Atlanta, Georgia; metro Portland, Oregon; and Austin, Texas. Our clients live across the U.S. and abroad.

Qualifications

- BS, BBA w/GPA of 3.3+
- Accounting, finance and/or economics majors encouraged
- CFP® candidates encouraged
- CPA candidates encouraged
- Entrepreneurial spirit
- Interest in helping people
- Interest in taxation and accounting
- Fascination with money management (essential)
- Strong verbal and written skills

Starting Salary

\$75K +, depending on experience, plus bonus and profit sharing (total package \$80K-\$90K)

Position Description

This position in our Atlanta office offers exposure to all areas of financial planning, income tax, and investment management for high net worth individuals. Projects will include tax preparation and planning; financial and estate planning; research; reviewing financial statements; applying business and economics skills; and communicating with clients. Investment experiences at Palisades Hudson Asset Management (our registered investment advisor affiliate) include hands-on exposure to the asset management business, such as conducting investment research, generating and creating monthly performance reports, and assisting clients. Additional opportunities involve participation in projects key to the growth of the organization.

Contact Information

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