



Tax Advisor

Part-Time · Westlake Village, CA

ABOUT SHERWOOD FINANCIAL PARTNERS

Sherwood Financial Partners is a fee-only Registered Investment Advisor serving high-net-worth and ultra-high-net-worth individuals and families. Through our proprietary Legacy Planning process, we help clients visualize, plan, and communicate their legacy wishes, going beyond documentation to build plans that integrate estate, investment, insurance, charitable, and tax strategy. Our practice has particular depth in charitable planning and private foundations.

THE ROLE

We are seeking a part-time CPA to lead tax preparation for approximately 30 client households annually, many of them corporate retirees, and to provide tax advice in support of our financial planning services. The role also serves as our in-house technical reviewer for trust, gift, estate, and private foundation returns prepared by our outside CPA partner. The Tax Advisor serves as the senior point of contact for client tax needs, partnering closely with our advisors and working directly with clients when advanced questions or planning opportunities arise.

RESPONSIBILITIES

- Prepare and review individual (1040) returns, with a focus on retirement income: pensions, Social Security, RMDs, and qualified plan distributions
- Perform technical second review of fiduciary (1041), gift (709), and private foundation (990-PF) returns prepared by our outside CPA partner, with particular attention to California conformity differences, and resolve open items with the preparer
- Serve as quality reviewer and technical resource for all client tax work
- Build tax projections and estimated payment calculations, including Roth conversion and distribution planning scenarios
- Review client books and records in advance of preparation
- Collaborate with advisors on planning, including retirement income, charitable giving, and trust and estate strategy
- Meet directly with clients on advanced tax questions and planning opportunities
- Partner with Compliance to ensure client data is properly archived and firm procedures are followed

REQUIREMENTS

- Active Certified Public Accountant (CPA) license, with continuing education kept current
- 3–5+ years of tax experience, with a strong background in individual tax preparation and planning
- Strong command of California tax, including federal/California conformity differences
- Participation in ongoing compliance and fraud-prevention training as part of our commitment to regulatory standards and safeguarding client assets

PREFERRED

- Experience preparing or reviewing trust (1041), gift (709), and private foundation (990-PF) returns (*strong preference*)
- Familiarity with retiree tax issues such as pension elections, NUA, deferred compensation, and IRMAA
- Working knowledge of Lacerte and QuickBooks
- Familiarity with bill pay and bookkeeping

WHAT WE VALUE

- Empathetic, client-centered communication
- Meticulous attention to detail and organization
- Reliability and ownership of deadlines
- A collaborative, team-first approach
- Self-driven curiosity and continuous learning

COMPENSATION & SCHEDULE

- **Compensation:** \$65–\$85/hour, depending on experience
- **Hours:** ~15 hours/week on average; approximately 25 hours/week February–April and around extension deadlines, lighter the rest of the year
- **Employment type:** Part-time W-2
- **Work environment:** In-office in Westlake Village; hybrid or remote arrangements considered for experienced candidates

TO APPLY

Please send your resume and cover letter to Hannah.boundy@sherwoodfp.com.