

## **Accountant / Bookkeeper**

At Solidarity Wealth, we are unified in ensuring client success through our independent wealth management and multi-family office. We focus on diligently listening to create trusted relationships with our clients to allow them to focus on what is important.

Our team is comprised of individuals committed to listening first and responding second. As such, we look for individuals who are dedicated, hardworking, and ready to take initiative.

### **Position Summary:**

Accountant/Bookkeeper applicants must have high attention to detail, exceptional interpersonal skills, and the ability to adapt in a fast-paced environment. Accountant/Bookkeeper will be responsible for ensuring client success in managing their personal accounting and bill pay.

### **Principal Responsibilities:**

- Building and maintaining positive and impactful relationships with clients and co-workers.
- Preparing consolidated financial statements for various individuals, trusts, and entities.
- Gathering and accurately coding various personal and professional transactions.
- Preparing transaction reports for client review and approval.
- Coordinating with clients to ensure timely approval and payment of bills.

### **Skills & Experience:**

- Bachelor's degree required.
- Minimum 2-3 years of public accounting experience.
- Experience with tax return preparation for individuals, trusts, and/or partnerships preferred.
- Proficiency in QuickBooks.
- Understanding of financial statement preparation.
- Exceptional written, verbal, and interpersonal skills.
- Excellent analytical skills.
- Ability to effectively prioritize and execute tasks in a high-pressure environment.
- High attention to detail.
- Ability to respond appropriately to shifting priorities and demands through analytical and problem-solving capabilities.
- Willingness to learn and assist where needed.

Solidarity Wealth is an equal opportunity employer.