LifeTime Asset & Tax Management

Job Opening:
Tax Director

LifeTime Asset & Tax Management is seeking a hands-on **Tax Director** to join its Raleigh-based team. This is a key succession-planning hire for the firm, with the opportunity to gradually transition into the lead tax seat over the next 6-12 months.

LifeTime's model is intentionally different from a traditional tax practice. The firm is built around integrated tax planning, financial advisory, and asset management, with most client relationships centered around long-term wealth planning rather than tax compliance alone.

This role is ideal for a CPA who enjoys tax but does not want to stay in a narrow, compliance-only lane. The right person should be interested in how tax planning connects to investments, retirement planning, estate planning, Roth conversions, capital gains strategy, and overall wealth management.

Base salary depends on education, experience, designations, and credentials; bonus packages are tied to individual and company performance; employees are supported with paid education opportunities to acquire or maintain licenses; additional benefits include paid medical, vision, dental, disability, and life insurance, 401(k) with an employer match, paid vacation and sick leave, and paid maternity/paternity leave.

Job Responsibilities:

- Lead tax planning and advisory work for high-net-worth individuals, families, and business-owner clients
- Support tax return preparation and review during tax season
- Provide year-round planning, including mid-year planning, year-end planning, capital gains planning, Roth conversions, tax projections, and estimated tax payments
- Take over client relationships over time as responsibilities transition from the current Tax Director
- Partner closely with the financial advisory / asset management side of the business
- Help clients think through tax decisions as part of their broader financial picture
- Provide oversight across the tax client base and help guide internal workflow
- Mentor and support the tax team as the firm continues to grow
- Bring ideas around client service, planning opportunities, process improvement, and the long-term direction of the tax function

Requisite Qualifications:

- CPA required
- 8–10+ years of tax experience
- Strong individual tax / 1040 background
- High-net-worth individual tax experience preferred
- Strong tax planning and advisory mindset
- Experience with business-owner clients, S-Corps, pass-through entities, closely held businesses and trusts and estates
- Interest in financial advisory, asset management, and broader wealth planning strongly preferred

- Wealth management, financial planning, private client, or family office exposure is a plus
- CCH Axcess experience preferred
- Strong client-facing skills and the ability to explain tax concepts clearly
- Comfortable in a hands-on Director role within a boutique firm environment
- Someone who wants to grow beyond tax compliance and become a broader advisor to clients
- Ability to work effectively with team members and clients fully aligned with the firm's core values

Benefits:

- 401(k)
- 401(k) matching
- Paid time off
- Health insurance
- Dental insurance
- Vision insurance
- Disability insurance
- Life insurance

Summary
This is a strong fit for someone who likes tax, enjoys working directly with clients, and wants to be more involved in the broader financial advisory conversation. The right person will not just be stepping into a tax review role. They will be joining a firm that uses tax as part of a larger planning relationship and is looking for a long-term leader who can eventually help guide that model forward.

Job Type: Full-time

Please email your resume, cover letter and compensation requirements for consideration to mark@lifetimeasset.com. EOE.

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