CREATIVE PLANNING

Title: **Solution Leader - Tax**

Location: Any Location/Hybrid/Remote

JOB SUMMARY

The Tax Solutions Leader is responsible for driving business development and revenue growth for the Creative Planning Tax Practice. This role is responsible for, but not limited to, managing incoming leads, achieving sales targets, cultivating new client relationships, and expanding the firm's market presence. The Solutions Leader must possess deep technical tax knowledge, understand the competitive marketplace, and serve as a trusted advisor throughout the sales process. By identifying client needs, developing strategic opportunities, and connecting clients with the appropriate tax solutions and subject matter experts, this role helps organizations address complex business challenges, mitigate risk, and achieve their long-term business growth objectives.

Job Duties

- Develop relationships and collaborate with Tax Team members to formulate and execute a go-to market strategy
- Answer all incoming leads within 24 hours or less
- Identify and qualify new client opportunities
- Manage all aspects of the sales cycle from potential clients through client onboarding
- Prepare and present proposals and service agreements through Salesforce
- Successfully close sales opportunities by building strong client relationships, effectively communication the Firm’s capabilities, and confidently addressing questions
- Lead proposal development and facilitate client presentations that drive successful business development outcomes
- Deliver product presentations and demonstrations of the Firm’s tax services to prospective and existing clients
- Cultivate and strengthen relationships with key referral partners through in-person, virtual, and telephone networking to generate new business opportunities
- Develop and execute strategic prospecting and partnership initiatives to expand Creative Planning's Tax Practice pipeline
- Collaborate with Tax Leaders, Wealth Managers, and other Firm leaders to identify cross-selling opportunities and to generate client referrals

EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from accredited university preferred
- 8+ years of Tax practitioner experience
- Active CPA Certification
- Experience providing high level customer service in a professional service setting
- Salesforce experience preferred

TECHNICAL SKILLS

- Proficient in Microsoft Office applications, including Excel, Word, and PowerPoint
- Excellent verbal, written, interpersonal, and organizational skills
- Strong understanding of sales principles, including marketing strategies, solution selling, product demonstrations, negotiation, and closing techniques.
- Ability to understand client needs and clearly articulate the business value and technical advantages of solutions.
- Proven ability to build and maintain strong relationships with prospective and existing clients.
- Experience translating client needs into practical, value-driven solutions.
- Strong analytical, critical thinking, and problem-solving skills with the ability to work independently and exercise sound judgment.
- Ability to comprehend, analyze, and interpret technical and business documents.
- High attention to detail with a commitment to accuracy and quality.
- Demonstrated commitment to collaboration, teamwork, and delivering exceptional client service.
- High level of integrity, dependability, professionalism, and a strong work ethic.

Salary Range: $125,000 - $150,000

Creative Planning, LLC is an independent wealth management firm, whose affiliates also provide business consulting, tax, financial, and other professional services to clients. Creative Planning and its affiliates lease employees and other resources to CP Assurance, an independent, separately governed, and licensed CPA firm, in support of audit and attest services CP Assurance provides to its clients.