JOIN OUR TEAM!

We are growing and looking for teammates that value a cutting-edge entrepreneurial environment along with a strong team approach to getting the work done. Schechter is a 3rd generation financial advisory firm focused on Investments, Private Capital and Life Insurance for High Net Worth (HNW) clients. We are a curious, knowledgeable team that always strives to deliver the right strategy for the client. We dig deep into the numbers, we vet, and research concepts and we deliver with the highest level of service. **It's who we are.**

OUR CORE VALUES

- Clients' needs first
- Create a complete "WOW" experience for clients and our staff
- Cutting edge knowledge – we strive to be the experts
- A special place to be

Tax and Estate Planning Attorney

Featured in Crain's 2021 'Cool Places to Work'- Schechter is a boutique, third generation wealth advisory and financial services firm. For over 80 years, we have quietly advised wealthy families on financial matters including: institutional quality investment advisory services, private capital and alternative investments, advanced life insurance planning, income and estate taxes, business succession and charitable planning. Our multi-disciplined team consists of one or more JDs, CPAs, LLMs, CLUs, PFSs, CAPs, MBAs, CFA® charterholders, CFP® practitioners and CIMA® consultants.

Essential Job Functions:

- Provide guidance and framework to Advisors, clients and Strategic Partners on matters relating to tax and estate planning.
- Assist Advisors and Underwriting Team, interfacing with insurance carriers where needed, on matters relating to insurable capacity and insurable interest.
- Work strategically and pro-actively with Advisors, the Marketing Team and the Wealth Team to continually assess product offerings, target markets and client-related procedures.
- Continually build upon and add to the technical knowledge of the Company and its products and services. Be a technical "expert" in the industry.
- Analyze and evaluate planning strategies that are proposed to the Company by outside sources.
- Assist as requested, provide in-house legal counsel to the Company on all matters within the scope of legal expertise.
- Provide training to New Advisors in the areas of basic tax and estate planning.
- Write technical articles that promote and support the Company's insurance products and strategies.

Please send your resume to careers@schechterwealth.com

Education/licensing

- Bachelor's degree required, business or marketing preferred
- Law degree required, LL.M. in taxation strongly preferred
- Life insurance license encouraged
- **Experience**
- Strong experience in advising clients with respect to Federal transfer tax and estate planning matters, as well as Federal income tax
- Experience with insurance products and other financial products and instruments
- Solid understanding of the underlying economics of various life insurance products (Term, Whole Life, Universal Life, Indexed Universal Life, Variable Life) and the way these products can be incorporated into estate and financial planning transactions
- Experience drafting and administering trusts is preferred
- **Required Skills**
- Exceptional technical abilities in the fields of individual taxation (income, gift and estate)
- Detailed understanding regarding all aspects of trusts, including trust law; trust provisions; trust operation; trust administration
- Excellent communication skills – verbal, written, presentation skills
- Strong technical and analytical skills
- Ability to understand complex financial concepts
- Polished, professional presence
- Goal motivated
- Strong intellectual curiosity to understand complex new financial products and legal concepts
- Enthusiasm: The company's culture is based on meeting our clients' needs and exceeding their expectations.
- **Preferred, but Not Required**
- LL.M. in Taxation strongly preferred, and Insurance License encouraged