



QuadCap Wealth Management, LLC

Position: Tax and Paraplanning Intern

Location: Frisco, Texas

Company Overview

QuadCap Wealth Management, LLC is a boutique firm located in Frisco, TX with an outstanding work environment. We are a quick-growing, independent wealth management firm that offers financial planning with a truly personal and proactive approach. At QuadCap, we offer fully comprehensive services including:

- Portfolio management
- **Tax planning and preparation**
- Estate planning
- Insurance planning
- Wealth transfer strategies
- Retirement planning
- Employee benefits planning

Responsibilities

- Primary responsibility will be coordinating with the tax departments, advisors and their clients in receiving, organizing and scanning client tax.
- Following up with advisors and ultimately clients on outstanding tax data
- Performing tax research projects
- Developing an understanding of basic individual tax principals and how we incorporate tax planning into investment strategies and retirement planning
- Sitting in with advisors in meetings (maybe virtual) with clients to review tax and comprehensive planning matters

Qualifications

- Positive, opportunistic, possessing an eagerness to learn
- Works well in a fast-paced environment
- Strong organizational skills
- Effective written and verbal communication skills