

Estate & Tax Planning Advisor

CM Wealth Advisors | Cleveland, Ohio



Position Overview

CM Wealth Advisors is seeking an experienced **Estate Planning & Tax Attorney** to join our client-focused wealth planning practice. CM Wealth Advisors is a boutique wealth management and multi-family office serving ultra-high-net-worth individuals and families. Founded in 1983, the firm is 100% employee owned and currently has 14 employee owners. This is a full-time, in-office position that combines estate and tax planning expertise, direct client interaction, and participation in the firm's growth efforts.

The attorney will work closely with internal and external clients and tax professionals, and outside legal counsel to develop and maintain thoughtful estate plans that reflect each family's goals and circumstances. Responsibilities include reviewing and interpreting estate planning documents, identifying opportunities to strengthen existing plans, coordinating with outside attorneys on document preparation, and identifying estate and tax planning strategies to help clients preserve and efficiently transfer wealth.

The ideal candidate will have meaningful estate planning experience and a strong understanding of estate, gift, generation-skipping transfer, trust, and individual income tax planning. Strong communication skills, sound judgment, and the ability to explain complex legal and tax concepts in a practical, understandable manner are essential.

The successful candidate will also have a desire and proven ability to contribute to the firm's business development efforts. For the right individual, this position offers the opportunity to become a future equity owner of CM Wealth Advisors.

Key Responsibilities

Estate & Tax Planning as a Client Advisor

- Work directly with clients and CM Wealth Advisors' internal client teams to understand each client's family circumstances, financial situation, estate planning objectives, tax situation, and long-term goals.
- Read, analyze, and summarize complex wills, trusts, powers of attorney, health care directives, and other estate planning and legal documents and identify provisions that may need to be updated, clarified, or reconsidered.
- Explain estate planning concepts and alternatives in clear, practical language so clients can make informed decisions and help clients define and articulate what they would like their estate plan to accomplish for themselves, their families, and future generations.
- Help clients think through important estate planning decisions, including beneficiary provisions, distribution terms, trustee and executor selections, powers of appointment, and planning for children and future generations.

- Proactively review clients' estate and financial circumstances for potential estate, gift, generation-skipping transfer, trust, and individual income tax considerations.
- Identify opportunities to structure the transfer of wealth in a tax-efficient manner while remaining consistent with the client's personal and family objectives.
- Work collaboratively with CM Wealth Advisors' internal tax and wealth planning professionals to identify tax planning opportunities for clients.
- Help ensure that estate plans remain consistent with each client's evolving goals and overall financial situation.
- Assist in evaluating lifetime gifting, charitable planning, trust strategies, business succession planning, and other tax-efficient planning opportunities when appropriate.
- Stay informed regarding changes in federal and state estate, gift, trust, and individual income tax laws and identify clients who may be affected by those changes.
- Collaborate with internal and external tax professionals when more specialized tax analysis is appropriate.

Coordination With Outside Counsel

- Coordinate with outside estate planning attorneys who will be drafting the client's documents – from sharing the information to negotiating the cost.
- Prepare clear summaries and outlines of clients' estate planning objectives and relevant tax considerations to facilitate the drafting process.
- Communicate client goals, desired provisions, and planning considerations to outside attorneys responsible for drafting the legal documents.
- Review draft estate planning documents before execution to help ensure they accurately reflect the client's intentions and agreed-upon planning strategy.
- Identify questions, inconsistencies, or provisions requiring clarification and coordinate with outside counsel to resolve them before documents are finalized.
- Assist clients in understanding their estate planning documents and key provisions prior to execution.
- Maintain productive and professional relationships with outside attorneys, accountants, and other professional advisors.

Qualifications

- Juris Doctor (J.D.) from an accredited law school with an active license to practice law and member in good standing of at least one U.S. state bar.
- Professional experience in estate planning, trusts and estates, tax planning, private client services, or a closely related practice area.
- Strong working knowledge of wills, trusts, powers of attorney, health care directives, fiduciary matters, and estate planning concepts.
- Knowledge of estate, gift, generation-skipping transfer, trust, and individual income tax concepts.
- Experience reviewing and interpreting sophisticated estate planning documents.

- Ability to identify both estate planning and tax planning opportunities and determine when additional specialized expertise should be involved.
- Experience working with high-net-worth and ultra-high-net-worth individuals and families preferred.
- Experience collaborating with wealth advisors, accountants, tax professionals, investment professionals, and outside legal counsel preferred.
- LL.M. in Taxation, CPA designation, or advanced tax training is a plus but not required.

Skills & Attributes

The successful candidate will:

- Be polished, professional, and comfortable working directly with clients and families.
- Be a team player who can work collaboratively as part of a multidisciplinary client service team.
- Be proactive in identifying both estate planning and tax planning opportunities.
- Communicate sophisticated legal and tax concepts in clear, straightforward language.
- Demonstrate excellent attention to detail and possess strong analytical, organizational, and legal document review skills.
- Exercise sound judgment, discretion, and sensitivity when dealing with confidential financial and family matters.
- Take ownership of planning matters and follow them through from initial discussion to implementation.

About CM Wealth Advisors

Founded in 1983, CM Wealth Advisors is a boutique wealth management and multi-family office serving ultra-high-net-worth individuals and families. The firm is 100% employee owned, with 14 employee owners today. We are focused on developing long-term relationships with the individuals and families we serve. Our approach extends beyond investment management to address the broader financial, tax, estate planning, and family considerations that affect our clients' lives.

Our professionals work collaboratively across disciplines and alongside our clients' outside attorneys and other advisors. We believe effective planning begins with listening—understanding what matters to each client and family and helping them develop strategies that reflect both their personal objectives and their financial circumstances.

The Senior Estate Planning & Tax Advisor will play an important role in that process by helping clients develop and maintain estate plans that reflect their wishes while also identifying thoughtful tax planning opportunities that can help preserve and efficiently transfer family wealth.

To apply, please send your resume to Aileen Werklund at: awerklund@cmwealthadvisors.com.