CORDA

TOGETHER WE'RE INVESTED

Company Overview

CORDA Investment Management, LLC is a forward-thinking, client-focused wealth management firm dedicated to serving high-net-worth individuals. Our mission is to provide proactive, integrated financial and tax planning. We aim to create lasting impact through strategy, collaboration, and insight.

Registered with the SEC under the Investment Advisers Act of 1940, CORDA upholds the highest standards of integrity and fiduciary responsibility.

Join a workplace where success is being part of a team that always puts the clients first!

CPA / Tax Strategist

We're seeking a CPA with 3+ years of experience who's ready to execute work in advanced tax planning. This is a unique opportunity to join a highly collaborative team where your input is valued, your ideas matter, and your work directly contributes to the long-term financial success of our clients. As a key member of our tax planning team, you'll be responsible for preparing and reviewing tax returns, developing advanced tax strategies, and working closely with advisors and clients to deliver coordinated, forward-looking tax planning. This is not a siloed accounting role. If you're a CPA who's ready to think beyond the numbers and become a trusted advisor to exceptional clients, we'd love to hear from you.

Location (Hybrid, 3 days in office): Memorial area of Houston, TX (Also open to Dallas or Austin applicants)

Position Type: Full-Time

Essential Duties & Responsibilities

- Prepare and review individual trust, and business tax returns for high-net-worth clients
- Collaborate with wealth advisors on proactive tax strategies throughout the year— not just at tax time
- Research and implement advanced tax planning strategies including entity structuring, retirement planning, charitable strategies, and equity compensation planning.
- Be involved with the planning team, helping clients with business succession planning
- Participate in client meetings and strategy sessions

- Maintain a deep understanding of evolving tax laws and how they impact our clients
- Build meaningful relationships with clients and help educate them on tax-related topics in plain language
- Contribute to a team-first culture where collaboration, communication, and mutual respect drive success

Education & Experience

- CPA license required
- 3+ years of tax experience, preferably with high-net-worth individuals and closely held businesses
- A proactive, growth-oriented mindset—you're not just looking for a job, you're looking to grow your career in the advisory space
- Strong technical knowledge in tax compliance and planning
- Ability to communicate complex tax strategies in a client-friendly, understandable way
- A collaborative spirit—you enjoy being part of a team and contributing to something bigger than yourself
- Interest or experience in financial planning and wealth management is a bonus