

Establish Financial Firm Seeking Strategic CPA Partner

We are a fast-growing financial planning firm located in the Granbury town square area.

We are seeking a trusted, steady, and people-centered **CPA or EA** to join our close-knit team who brings confidence, care, and expertise to the financial foundation of our firm.

You will partner directly with leadership, support internal teams, and ensure the financial health and compliance of the firm as we continue to grow thoughtfully and responsibly.

Structure

- Flexible rent structure (approx. \$1,000- \$3,000/month depending on space used)
- Long-term partnership opportunity for the right fit, where your expertise creates measurable impact

This is a unique opportunity for the right professional to:

- Plug into an existing client base with warm, intentional introductions into existing relationships
- Potential for referrals year-round
- Collaborate on advanced tax strategies with opportunities to co-lead educational events & client strategy sessions
- Expand your book of business significantly

In addition, we will provide availability to:

- Professional office setting with dedicated workspace options, including
 - o Reception Area
 - o Shared conference room
- Platform to grow your visibility and influence within a curated client base

Our Clients

We work with pre-retirees, retirees, business owners & entrepreneurs, and high-income households seeking clarity, efficiency, and long-term strategy. These clients are not just looking for basic filing, they are looking for guidance, foresight & precision.

Our goal is to build a **long-term strategic relationship** where:

- You support tax planning and preparation
- We introduce your services to our clients
- We collaborate to deliver high-level planning, including
 - o Tax-efficient retirement strategies
 - o Roth conversion planning
 - o Tax-free income structuring
 - o Business and real estate tax optimization

Ideal Candidate

- CPA, EA, or Experienced Tax Strategist
- Understands
 - o Tax minimization strategies
 - o Retirement tax planning
 - o Business structuring
- Has a proven record of successfully accomplishing & maintaining client goals
- Values relationships, integrity, and long-term thinking— open to collaboration and building something meaningful

If this resonates, we welcome a conversation to explore whether there is a natural alignment in how we serve clients and build relationships.

To Apply

Please submit:

- Full Resume & Background
- Description of your current practice
- Areas of tax specialization
- Interest in partnership/collaboration

Hybrid Financial

“Where strategy, relationships, and long-term thinking come together.”

Hybrid Financial is a fast-growing financial firm dedicated to helping individuals and families build secure and fulfilling retirement plans. At our core, we are a relationship-driven organization that values integrity, clarity, and long-term thinking. Our team works closely together, and every role plays a meaningful part in supporting our CEO, each other, and our clients.