

## TAX PREPARER



**DEPARTMENT:** TAX  
**CLASSIFICATION:** SEASONAL, EXEMPT  
**REPORTS TO:** TAX MANAGER  
**SUPERVISES:** NO ONE

**SUMMARY:** Responsible for organizing and coordinating clients' tax data for the accurate, timely completion of individual tax returns and simple to moderately complex corporate, partnership, S-Corp and trust tax returns.

- Seasonal: Monday through Friday; 8:00 a.m. until 5:00 p.m. beginning January through April 15.
- Weekends and overtime may be available..
- Formal and on-the-job training is provided in order to prepare a tax preparer for their duties and responsibilities.

**DUTIES AND RESPONSIBILITIES:** Include the following and are required to perform this job successfully. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Reviews tax information submitted by client for completeness; communicates with clients..
- Possesses basic knowledge of income tax regulations in order to answer clients' questions.
- Prepares personal tax returns of various complexities.
- Prepares corporate, partnership and S-Corp returns not requiring advanced expertise.
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- Makes adjusting journal entries and completes trial balances in order to prepare a tax return.
- Maintains a good understanding of depreciation in order to read and understand depreciation reports.
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- Works with confidential client information ; require ability to keep matters confidential.
- Such other duties as may be assigned.

### **SPECIAL SKILL REQUIREMENTS:**

- Proficient computer skills, including Microsoft Word and Excel.
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- Must have good interpersonal and communication skills and conduct himself/herself in a professional manner.
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- Should be detail-oriented, have good organizational skills and possess the ability to be adaptable and handle multiple tasks.
- Must be a willing team-player

### **REQUIRED EXPERIENCE:**

- At least two (2) years' experience preparing individual, corporate, partnership and S-Corp tax returns.
- At least one (1) year experience using computerized tax preparation, tax planning and tax research software.

### **REQUIRED EDUCATION:**

Bachelor's Degree in Accounting or Bachelor's Degree in another discipline with various coursework in taxes and accounting, through intermediate level from a four-year College or University, with a minimum GPA of 3.0 at graduation.

**PHYSICAL REQUIREMENTS:**

All of the following physical requirements are those that may be necessary to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Sitting; standing; walking or moving throughout facility; driving (and valid driver's license); talking; seeing (specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus); hearing; feeling; bending or stooping; squatting or crouching; reaching; kneeling; pushing; pulling; lifting up to 25 lbs. Minimal safety hazards; general office working conditions. This job description may not list all the duties of the job. You may be asked by Supervisors, Managers, Directors or other firm management to perform duties outside of this description, but those that are typical to working in CPA firm environment. You will be evaluated in part based upon your performance of the tasks listed in this job description.

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