



# Job Description: Tax Preparer

## **Definition**

Tax Preparers are employees with an educational background in tax preparation and tax law, and some education in accounting and financial statement preparation.

## **Reporting to:**

Tax Manager and President

## **Hours:**

Part-Time to Full Time, flexibility in summer months, overtime required during tax season, remote working options available

## **Compensation:**

Based on qualifications and experience, average range \$25-\$35 per hour.

## **General Expectations:**

Tax Preparers are expected to:

- Complete tasks assigned to them by their supervisor
- Develop efficient work habits—Work must be accurate, organized and prompt
- Practice effective communication, both with staff and clients, when completing all tasks
- Recognize how assigned tasks affect the final work product
- Complete tax return checklist and analysis noting key points and variances
- Maintain client and firm confidentiality
- Behave professionally while demonstrating courtesy and friendliness
- Follow the firm's procedures and comply with the policies outlined in the personnel manual
- Identify problem areas in the engagement and discussion with the supervisor-be proactive

## **Assignments**

Tax Preparers will be responsible for all assignments made by their supervisors. Tasks may include the following:

- Tax return preparation, primarily individual 1040's at first and adding in business returns
- Computer software applications
- Responding to Agency notices
- Tracking workflow for status updates and client reminders
- Interacting with clients, referral sources, and staff
- Other tasks assigned by the supervisor

## **Professional Development**

- Tax Preparers are expected to develop professionally by:
- Participating in continuing professional education
- Accepting additional responsibility
- Representing the firm and promoting its image by attending local professional and business organization functions
- Learning new technology the firm introduces into the work environment

## **Educational Requirements**

Tax Preparers should possess a minimum of an Associate's degree in accounting or work experience, demonstrated knowledge of basic tax preparation and tax laws, accounting principles, and proficiency in related computer software

## **What makes an ideal candidate?**

Tax Preparers Requirements:

- Associates degree in accounting or work experience, possibly continuing into BA program
- 2-3 years' experience in public accounting or equivalent work
- Ability to communicate verbally
- Desire to be a part of a team and help create solutions
- Ability to learn Quickbooks
- Courteous and friendly

\*\*Preferred candidates will have experience with tax preparation software (such as Ultra Tax), small business accounting programs (such as QuickBooks) financial statement write up software (Such as Accounting CS) and client database and workflow systems (such as OfficeTools).

## **Notes**

Every employee works for Gray CPA, Inc., not only for a particular supervisor or department. Accordingly, employees are expected to act in the best interests of the firm, even if doing so requires actions or responsibilities not listed in the above job description. This job description is provided for informational purposes only and is subject to revision by management when client service needs change.