

JOB DESCRIPTION

Position Title: Staff, Tax & Accounting (T&A)
Reports to: Principal / Director/Sr. Manager/Manager/Supervisor/Senior
Department: Tax
FLSA: Exempt
Prepared by / Date: Z. Ciffoni, 07/15/2019
Approved by / Date:

Position Summary:

The position Staff, Tax & Accounting is responsible for applying his/her technical skills to prepare tax returns for individuals, trusts, partnerships and corporations. The individual is expected to perform assigned tasks under close coaching and supervision. The Staff position acts as a vital resource for the Tax & Accounting team meeting performance goals, preparing tax forms and estimates, responding to tax-related client questions and inquiries from the IRS and/or other tax authorities.

Essential Duties and Responsibilities:

- Analyzes data and prepares workpapers and tax returns based on professional standards
- Assists with tax planning, research and consulting engagements
- Develops and maintains effective, professional, and courteous relationships with clients and delivers exceptional client service.
- Organizes work efficiently, understands performance expectations including utilization, realization and the completion of tasks within assigned timeframe.
- Identifies, researches, and assesses various tax issues and provides information and/or accurate status reports to seniors, managers and/or team lead
- Researches technical issues and applicable accounting standards, market trends and business developments, and participates in technical discussions related and relevant to client assignments.
- Develops an understanding of the Firm structure, the people, the services the firm provides and the firm's clients.
- Builds a network of peers externally through professional associations, Young CPA network, university/school studies and client work, and participates in High School visitations to nurture future CPA candidates.
- Perform other duties as assigned

Knowledge, Skills and Abilities:

- Effective verbal and written communication skills
- Strong judgment, problem-solving, decision-making abilities
- Ability to gather data from a variety of sources and use relevant technology
- Effective planning and organizational skills and ability to establish workload priorities

- Ability to work additional hours as needed and travel to various client sites as required
- Knowledge of technical tax requirements, laws and accounting principles
- Solid knowledge of Microsoft Office to produce workpapers to support tax return preparation
- Ability to comply with the Firm's policies and procedures
- Ability to support the Firm's mission, vision and values by exhibiting behaviors of excellence and competence, teamwork, innovation, respect, commitment and accountability

Minimum Requirements:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily.

- Bachelor's degree in Accounting
- Strong academic track record

Work Environment:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. While performing the duties of this job, the noise level in the work environment is usually quiet

Physical Demands:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to sit and reach with hands and arms. The employee is regularly required to use hands to finger, handle, or feel objects, tools, or controls and talk or hear.

Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

ACKNOWLEDGEMENT:

I have read and acknowledge receipt of a copy of my job description

Signature

Date

Printed Name