

Position Title: CPA/Tax Associate
Reports to: Director of Tax Services

Position Summary: The CPA/Tax Associate will prepare federal and state income tax documents. Responsible for ensuring accurate and complete returns are filed in a timely manner. Individual will confirm that tax forms are completed in compliance with all applicable legislation and regulations.

Essential Functions:

- Prepare or assist in preparing simple to complex tax returns for individuals, families and/or small businesses.
- Interview clients to get a comprehensive picture of their financial situation.
- Answer questions from clients and taxpayers.
- Utilize federal, state, and local codes to ensure minimum tax liability required by law.
- Discover potential deductions and credits.
- Analyze financial records such as income statements and documentation of expenditures.
- Contact State Taxing Authorities to request transcripts as needed.
- Verify totals on past forms for accuracy.
- Collaborate with wealth management team regarding broader deliverables.
- Ensure a copy of the completed return is provided to client.
- Maintain records for each case, including contacts, telephone numbers, actions taken.

Other Duties:

- Maintain compliance with Prentice Wealth Management standards of conduct.
- Perform all other duties as assigned.

Education & Experience:

- Bachelor's degree in business administration, management, or related field.
- 5+ years of related work experience preferred.
- IRS-issued Preparer Tax Identification Number required.
- Prior experience in a professional service industry (i.e. law/financial/accounting firm) preferred.
- Proficiency with tax preparation software.
- Proficiency with Microsoft Office (Teams, Word, Outlook & Excel), SharePoint, Zoom, and Adobe Acrobat.
- Prior knowledge of financial products, policies & procedures is highly preferred.

Knowledge, Skills & Abilities:

- Ability to maintain a high level of accuracy & confidentiality concerning client financial information and files.
- Professional attire and demeanor.
- Superior level of customer service.
- In-depth knowledge of tax preparation procedures and analytical skills to provide optimal client results.
- Attention to detail and effective organizational and time management skills.
- Excellent interpersonal & telephone communication skills.
- Ability to work both independently and as part of a team.

Physical Demands & Work Environment:

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.

- Ability to lift and/or move up to 35 pounds.
- Frequently required to sit, reach with hands and arms. Occasionally required to stand, walk, climb stairs, balance, stoop, kneel, crouch.
- Noise level in the work environment is low to moderate.

I can, with or without reasonable accommodation(s), perform the essential functions of this position:

Employee Name

Employee Signature

Date