Position Title: Tax Professional
Reports to: Managing Partner(Tax Director seasonally)
Salary: $80,000 -$100,000 , Bonus Eligible

Position Summary: The Tax Professional will prepare federal and state tax documents. Responsible for ensuring accurate and complete returns are filed in a timely manner. Individuals will confirm that tax forms are completed in compliance with all applicable legislation and regulations. Outside of tax season, this individual will offer support to the overall team with items such as but not limited to trust work, compliance and client meeting presentations.

Essential Functions:

- Prepare and file simple to complex tax returns for individuals, families and/or small businesses.
- Provide a weekly overview of pending and completed tax returns during tax season.
- Interview clients to get a comprehensive picture of their financial situation.
- Answer questions from taxpayers
- Utilize federal, state, and local codes to ensure minimum tax liability required by law.
- Discover potential deductions and credits.
- Review 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 advisors to support the client's financial plan and recommend additional services.
- Ensure a copy of the completed return is provided to the client.
- Maintain records for each case, including contacts, telephone numbers, actions taken.
- Prepare tax vouchers for clients when recommended or requested.
- Participate in client meetings when requested to address specific tax issues.
- Stay up to date on tax codes and laws to ensure firm and client compliance.

Other Duties:

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

Education & Experience:

- Bachelor's degree in accounting, finance, business administration, management, or related field.
- 2+ years of related work experience preferred.
- IRS-issued Preparer Tax Identification Number not required but preferred.
- Prior experience in a professional service industry (i.e. law/financial/accounting firm) preferred.
- Proficiency with tax preparation software not required but preferred.
- Proficiency with Microsoft Office (Teams, Word, Outlook & Excel), SharePoint, Zoom, and Adobe Acrobat.
- Prior knowledge of financial products, policies & procedures is highly preferred.
- CPA preferred but not required.

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.
- A passion for Financial Planning.

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**