



Job Description: Tax Preparer  
Reports to: President  
FLSA Status: Full-time (30-40 hours per week); Non-Exempt

### **Position Summary**

The Tax Preparer is responsible for preparing quarterly and annual tax forms and financial documents on behalf of clients and optimizing clients tax situations. The Tax Preparer will establish rapport with clients and build lasting working relationships both internally and externally. This position will communicate with clients about their income and expenses, audit account details and act as a liaison between clients and the IRS. The Tax Preparer is an instrumental part of our firm's internal operations as well as client experience. In addition to maintaining our mission, vision and adhering to our core values, the Tax Preparer must provide the highest level of service to our clients and support the firm's client-centric attitude and culture.

### **Primary Duties and Responsibilities**

- Gather and keep up to date on all appropriate information and systems to accurately calculate taxes for clients
- Inform clients of important paperwork and documentation needed to complete tax forms properly
- Work closely with clients to obtain information regarding potential deductions or allowances
- Address client questions and concerns regarding financial statement, tax forms and related information
- Prepare various federal and state income tax returns and financial reports utilizing information provided by clients and inputting into tax preparation software
- Prepare tax planning summaries, suggesting tax saving strategies
- Verify tax forms completed by clients to ensure their proper submission
- Properly research and seek the advice of senior preparers when confronted with particularly challenging tax circumstances
- Create invoices and requests payment for services rendered based upon the level of difficulty and time spent preparing the forms
- Assist in federal and state audits as needed
- Provide support for other projects or duties as needed

### **Qualifications and Requirements**

- 3-5 years of experience in accounting or bookkeeping, with solid understanding of accounting processes, financial statements and journal entries required
- High school or GED is essential, college-level courses in accounting preferred
- 2-3 years of experience working deeply in Excel and QuickBooks or equivalent
- Skilled using tax preparation software and experience in troubleshooting common tax program problems
- Attention to detail and skillfully accurate
- Ability to effectively present information and respond to questions verbally and in writing
- Professional experience working with confidential and sensitive information

- Knowledge of state and federal tax form processes and how to accurately prepare forms
- Ability to prioritize daily tasks and meet timely obligations with many clients
- Ability to read, analyze and interpret general business periodicals, technical procedures or governmental regulations

**EEO Statement**

The Business Guides is an equal employment employer that provides opportunities to all employees and applicants for employment without regard to race, color, ancestry, national origin, gender, sexual orientation, marital status, religion, age, disability, gender identity, results of genetic testing, or service in the military.

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Employee (Print Name)

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Employee Signature

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Date

## PHYSICAL REQUIREMENTS AND POTENTIAL HAZARDS FOR TAX PREPARER

The following identifies the physical demands and potential hazards typically encountered by this position. The information is necessary in part to ensure compliance with the Americans with Disabilities Act and the OSHA Blood borne Pathogens Standards. These can reasonably be anticipated in the normal and customary performance of the essential functions of your work.

**NA:** Not applicable, not required of this position.

**NE:** Requirement is present, but is not essential to the position.

**O:** Occasional, up to 33 percent of the time and essential to the position. (For example, a lifeguard swims only occasionally, but it is essential that a lifeguard be able to swim.)

**F:** Frequent, 34-66 percent of the time.

**C:** Continuous, over 66 percent of the time.

	NA	NE	O	F	C
Sitting					X
Walking			X		
Standing			X		
Running		X			
Bending or twisting			X		
Squatting or kneeling			X		
Reaching above shoulder level		X			
Climbing (e.g. ladders)		X			
Driving cars, light duty trucks			X		
Driving heavy duty vehicles	X				
Repetitive motion of hands/fingers					X
Grasping with hand, gripping			X		
	NA	NE	O	F	C

Lifting/carrying 10-25 pounds			X		
Lifting/carrying 26-50 pounds			X		
Lifting/carrying more than 50 pounds		X			
Pushing/Pulling		X			
Using Foot Controls		X			
Work in/exposure to inclement weather	X				
Work in/exposure to cold water	X				
Exposure to dust, chemicals or fumes	X				
Work/live in remote field sites	X				
Use of hazardous equipment (e.g. guns, chainsaws, explosives)	X				
Swimming, scuba diving	X				
Work at heights (e.g. towers, poles)	X				
Exposure to infection, germs or contagious diseases	X				
Exposure to blood, body fluid, or potentially contaminated materials	X				
Exposure to needles or sharp implements	X				
Use of hot equipment (e.g., ovens)	X				
Exposure to electrical current		X			
Seeing objects at a distance		X			
Seeing objects peripherally		X			
Seeing close work (e.g., typed print)					X
Distinguishing colors		X			
Hearing conversations or sounds					X

	NA	NE	O	F	C
Hearing via radio or telephone					X
Communicating through speech					X
Communicating by writing/reading					X
Distinguishing odors by smell	X				
Distinguishing tastes	X				
Exposure to wild/dangerous animals	X				
Exposure to insect bites or stings	X				
Work/travel in boat/small aircraft	X				
Exposure to aggressive/angry people			X		
Restraining/grappling with people	X				
Other: High volume of client contact					X
Other:					

I have read and understand the physical requirements and potential hazards of this position and am able to perform the physical requirements as stated above with or without reasonable accommodation.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date