



Seasonal Tax Preparation Assistant

Please email your resume and cover letter to Chris Flessert at cflessert@kollathcpa.com.

Position Title: Seasonal Tax Preparer

Classification: Non-Exempt

Department: Tax

Reports to: Tax Manager

Date Created: August 6, 2018

Revision:

Approval: In Development Pending Approved/Date: August 13, 2018

POSITION SUMMARY: The Seasonal Tax Preparer will prepare income tax returns for individuals and businesses under the direction of the Tax Manager.

ESSENTIAL DUTIES:

1. Prepares Federal and state individual and business tax returns. Reviews financial records such as prior tax returns, balance sheet, income statements, and documents of expenditures to determine forms needed to prepare return.
2. Interviews client to obtain additional information on taxable income and deductible expenses and allowances.
3. Follows up with client on missing documents and information.
4. Completes entries on forms, following tax form instructions and tax tables using our tax software.
5. Consults tax law handbooks and resources, and tax staff with questions on tax preparation.
6. Calculates form preparation fee according to complexity of return and amount of time required to prepare forms.

NONESSENTIAL DUTIES:

1. Completes other assignments and projects to meet firm needs.

BUSINESS CONTACTS

Works with both internal and external customers to respond to inquiries and communicate findings.

SUPERVISORY RESPONSIBILITY: None

Brookfield:

295 Regency Ct., Ste. 104
Brookfield, WI 53045
Phone: 414-751-6847
Fax: 866-486-4261

Middleton:

2501 Parmenter Street, Ste. 100B
Middleton, WI 53562
Phone: 608-824-3002
Fax: 608-486-4261

Madison:

131 W. Wilson Street, Ste. 610
Madison, WI 53703
Phone: 608-824-3002
Fax: 608-486-4261

Prairie du Sac:

421 Water Street, Ste. 111
Prairie du Sac, WI 53578
Phone: 608-644-0206
Fax: 608-643-3467

www.kollathcpa.com
www.sustainablehr.net
www.organicpayroll.com

MINIMUM QUALIFICATIONS (Experience, Education, and Special Certifications)

1. Two years of progressive experience in tax preparation and compliance services preferred.
2. Prior Federal and state individual tax return preparation experience required.
3. Prior Federal and state business tax return preparation experience preferred.
4. Proficient with computer software applications, preferably Microsoft Office, Word, and Excel.
5. Proficient and accurate computer keyboarding skills required.

KNOWLEDGE, SKILLS, AND ABILITIES

1. Basic knowledge of application of Generally Accepted Accounting Principles (GAAP) accounting principles.
2. Ability to handle, work with, and maintain confidential and sensitive information.
3. Demonstrated ability to think and work independently.
4. Ability to articulate ideas and information verbally and in writing in a clear, tactful, and diplomatic manner.
6. Knowledge of multiple computer software applications, preferably Microsoft Office, Word, and Excel.
5. Effective and thorough problem-solving skills.
6. Ability to work productively within a team environment.
7. High attention to detail and ability to produce accurate, error free work.
8. Proficient and accurate data entry and keyboarding skills with a strong attention to detail.
9. Ability to create and work on documents in various computer software applications efficiently and accurately.
10. Ability to learn and work in computer applications.
11. Attentive listening skills to understand what people are communicating.
12. Efficient organizational skills.

PHYSICAL DEMANDS

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

While performing the duties of this position, the employee is regularly required to talk and hear. The employee is frequently required to sit for long periods of time and use a computer keyboard, monitor, mouse and telephone. The employee must occasionally lift and/or move up to 10 pounds. The employee is required to have the following specific vision abilities: close vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT

The work environment characteristics described below are representative of those an employee encounters while performing the essential duties 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 works in an office environment. The noise level in the work environment is usually quiet, although conversations can be heard.

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