I. JOB SUMMARY –
As a representative of our tax office, you are responsible for providing an outstanding client experience by supporting office operations through direct client interaction (in-person, phone, email, etc...), filling in back-office and front-office roles as needed, scanning documents, data entry, document assembly and more. When completing data entry, you are expected to provide an accurate and complete tax return, using a high degree of ethics and integrity. You will incorporate effective communication skills with both clients and fellow associates, promoting teamwork and collaboration throughout the office.

II. ESSENTIAL DUTIES AND RESPONSIBILITIES –

1. Conduct tax interviews and research tax questions for the purpose of preparing complete and accurate tax returns. Review completed tax forms for accuracy and compliance. Refer more complex returns to a more experienced Tax Professional in accordance with the Office Manager’s instructions.

2. Provide tax information to clients as it relates to tax preparation and refer any unresolved client concerns in accordance with the Office Manager’s instructions.

3. Finalize tax returns so client can either request electronic filing or make arrangements to pick up completed return at the tax office.

4. Communicate the fee for products and services in accordance with established schedule of charges. Collect necessary fees and submit fees and related documentation in accordance with the Office Manager’s instructions.

5. Provide any additional research or follow-up necessary to change or update returns and contact client of the required changes.

6. Promote and provide additional or alternative tax and financial products, which the company may make available.

7. Take initiative to seek new clients by asking current clients for referrals and actively develop and execute client acquisition plans. Engage in local marketing and business building activities.

8. Remain current with office policies and procedures. Read other business publications, as recommended by the Office Manager’s instructions.

9. Attend training required for the position.

10. Prepare any additional administrative forms as required.

11. Assist in maintaining proper office appearance and cleanliness. Ensure that workstation is neat and clean at all times.

12. May perform duties of other office support positions. As necessary, assist in opening the office and participate in the end of day processes related to accounting, office appearance, and office closing.

13. Other duties, as assigned