

JOB DESCRIPTION

Position Title: Seasonal Tax Support

Supervisor: Administrative Services Manager

Primary Assignment: Tax Support Services

Secondary Assignment: Account Support Services
 Reception

Position Purpose

Fulfill the corporate mission and vision by performing Tax Season Support duties in accordance with Firm values.

Duties

The Seasonal Tax Support position purpose will be achieved by effectively demonstrating:

- A. Prompt, professional and accurate processing of individual and business tax documents. Assigned processing duties may include:
 1. Print and file source document cover sheets.
 2. Collate and mail 1099/W-2 letters.
 3. Print, collate and mail organizers.
 4. Generate 1099, W-2 and Payroll Tax forms as directed by Account Managers.
 5. Process individual tax returns
 6. Notify clients when tax returns are ready to be signed.
 7. Place tax returns in "sign" file and update the log.
 8. Pull and file for warehouse storage source documents.

- B. Prompt, professional and accurate delivery of assigned account and department support services. Assigned services may include:
 1. Prepare correspondence as directed by assigned Account Managers.
 2. Accurate and prompt completion of basic bookkeeping accounting tasks utilizing client records.
 3. Facilitate efficient administration of "pick up drawer" processing for each account by filing, monitoring and releasing client payroll and tax return documents as required.
 4. Promote smooth account administration by corresponding with Clients, Account Managers, Department Managers and other personnel as required.
 5. Prepare engagement letters and other forms as directed by assigned Account Managers and to support Department Managers.
 6. Research and resolve document related issues as directed by Account Managers.
 7. Maintain tax season readiness as directed by Account Managers.

- C. Prompt, professional and accurate completion of assigned reception tasks. Assigned tasks may include:
 1. Process incoming and outgoing postal mail according to approved protocol.
 2. Process incoming correspondence received via email and fax.
 3. Schedule appointments for designated account managers.

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- D. Proactive engagement in ongoing professional development.
 - 1. Maintain expert knowledge, skills, and abilities in core areas by seeking out and participating in continuing education courses, seminars, and other learning opportunities.
 - 2. Review appraisal findings and collaboratively create professional development plans with the Department Manager.
 - 3. Execute professional development plans.
 - 4. Participate in selected and designated training opportunities to ensure proficient knowledge, skills, and abilities in assigned areas.

- E. Client relationship building initiative.
 - 1. Identify, develop and systematically implement agreed upon services that enable the firm to remain on the forefront of customer service delivery.
 - 2. Collaborate with other department personnel by communicating effectively, offering expertise when requested and requesting professional input from other content experts as required.
 - 3. Remain current on “other” internal and external services offered by the firm to help clients achieve specific goals or satisfy particular needs.
 - 4. Implement firm processes for identifying client opportunities and recommending “other” services.

- F. Active engagement in continuous department improvement planning and execution.
 - 1. Initiate identification and communication of issues to keep management aware of opportunities for department and/or organizational improvement.
 - 2. Participate in department action planning with other personnel as directed by the Administrative Services Manager.
 - 3. Execute continuous department improvement plans with fidelity.
 - 4. Continuously monitor annual action plan execution and report progress to the Administrative Services Manager.
 - 5. Actively evaluate department plans with the Administrative Services Manager and adapt plans flexibly through daily practice and periodic meetings or work sessions.

- G. Compliance with all handbook policies and operational procedures.

- H. Completion of other projects and duties assigned by the Administrative Services Manager.