

**Position Title:** Summer Intern

**Supervisor:** Tax and A&A Supervisor

### Position Purpose

Fulfill the corporate mission and vision by performing accounting duties in accordance with Firm values.

### Duties and Expectations

- A. The Summer Internship position purpose will be achieved by effectively:
  1. Completing monthly accounting (receipts and disbursements) for business clients, including bank reconciliations.
  2. Acquiring proper documentation for client retirement plans.
  3. Acquiring proper documentation for client's stock ownership, LLC membership data, capital contributions, etc.
  4. Generating various in-house data base reports for client workloads.
  5. Researching TCJA ramifications, and ensure proper use for business clients.
  6. Assisting Tax Staff with fiscal year-end work paper preparation.
  7. Assisting Business Services Staff with quarterly payroll tax filings, etc.
  8. Any other Tax Staff projects needed in the summer months.
  9. Complying with all handbook policies and operational procedures.
  10. Completing other projects and duties assigned by the Tax and A&A Supervisor.
  
- B. Knowledge, Skills and Abilities
  1. Customer Service. Demonstrated use of principles and processes for providing outstanding customer service. This includes customer needs assessment, meeting quality standards for services and evaluation of customer satisfaction.
  2. Judgment and Decision Making. Demonstrated ability to systematically consider relative costs and benefits of potential actions; critically analyze related variables; and logically apply reasoning when selecting goals and making plans.
  3. Communication. Demonstrated use of communication to understand and correctly interpret information and ideas presented through non-verbal, verbal and written modes as well as to convey information and ideas professionally to individuals and groups through presentation of words, actions, and documentation.
  4. Technology. Demonstrated use of computers, Microsoft Office Suite software, internet and other electronic means to gather and disseminate information; communicate with colleagues and customers; construct and revise Word and Excel documents; and store and retrieve data.
  5. Economics and Accounting. Demonstrated use of economic and accounting principles/practices, financial analysis and succinct reporting of financial data.
  6. Attendance. Demonstrated ability to consistently arrive to work on time and remain focused on task throughout the day without allowing distractions to interfere with completion of work.