



## Tax Preparer Trainee

Are you interested in learning how to prepare income taxes? If so, and you would like to join a dynamic Tax Team where you will have the opportunity to work with a group of very talented and experienced tax professionals, we would like to explore the possibilities of having you join our team.

Our team of tax experts are ready to train you to be a tax professional. You will have the opportunity to work with senior level tax professionals who will coordinate their efforts to oversee and mentor you as you learn how to prepare tax returns, engage in tax planning, work with our Financial Advisors, and interact with our clients.

The training and development process is designed to teach you how to perform the following duties:

### The Role:

The Tax Preparer Trainee will:

- Learn how to prepare tax returns
- Learn how to assume a role in the tax planning process.
- Learn how a tax preparer assumes a role in the tax preparation of other entities.
- Learn how to interact with clients to clarify questions and data for the preparation of tax returns and projections.
- Learn how to maintain a good working relationship with clients and staff to enhance client satisfaction.
- Learn how to work closely and proactively with clients and Financial Advisors.
- Learn how to respond to federal, state, and local correspondence received on behalf of assigned clients.
- Learn how to perform research in order to properly answer client and Financial Advisor questions concerning taxes.
- Learn how to use resources to keep current on applicable tax regulations, changes in code, court rulings, etc.

## Qualifications

- Excellent academic record; two-year college degree required, four-year college degree preferred; the equivalent in training and experience will be considered.
- No previous tax experience is required. You must like working with numbers and be extremely detail oriented.
- We will consider a pending and/or recent graduate with a mixture of academic and internship, training; preference will be given to pending and/or recent graduates from an accredited academic program that prepares graduates to sit for the CPA exam. Practical Tax experience would be strongly preferred.
- We strongly encourage applicants considering a career change to consider applying for this position. We will consider applicants with transferrable skills.
- Excellent interpersonal and communication skills
- Proven track record as a self-starter, with high levels of intensity and motivation
- Demonstrated passion for providing exceptional client service
- Strong technical skills

## Perks & Benefits

- Ability to have a long-lasting and visible impact on client's lives
- Opportunity to be part of the firm as we grow and expand to meet the current and future needs of our clients
- Work for an organization that is strongly committed to ethics and values, offers a warm and welcoming environment, is flexible, and is supportive of training, development, and continuing education
- Work with a group of talented and very experienced Tax professionals, comprised of CPAs and Enrolled Agents (EA), with strong professional networks
- Comprehensive dental and health care benefits, life insurance, 401K, SEP-IRA
- Access to all JGUA portfolio management and financial planning services for you and your family
- Regular company outings
- Community Involvement

## About Us

John G. Ullman & Associates is a wealth management firm committed to bringing human connection, attention to detail and trust to every aspect of financial planning. For over 40 years, we have helped clients plan for a lifetime of financial security, creating highly customized financial plans to manage, grow, and protect our client's wealth. Our team has grown to include a diverse group of expert financial planners, tax professionals, investment researchers, legal professionals and support staff in three separate New York State Locations; including our headquarters located in Big Flats, NY; and branch offices located in Corning, NY and Rhinebeck, NY.

## To Apply

If you are interested in applying please e-mail a letter of interest and resume to Scott Schoonover, Director of Human Resources at [HR@jgua.com](mailto:HR@jgua.com). Please use Reference # JGUA-Trainee.