



## Tax Preparer Trainee

John G. Ullman & Associates, Inc. is seeking a Tax Preparer Trainee to join our firm. This is an essential position in our firm that will play a significant role in our strategic plans.

This is an exciting time to join our firm as we continue to grow. As a Tax Preparer Trainee, you will have the opportunity to join a highly trained and experienced tax services team. Located in our Big Flats headquarters, the tax services team is a blend of CPA's, Enrolled Agents, and tax professionals working towards their tax professional designations.

In this position, the Tax Preparer Trainee will have the opportunity to work with senior level tax professionals who will coordinate their efforts to oversee and mentor the Tax Preparer Trainee as they learn how to prepare tax returns.

The Tax Preparer Trainee will engage in training and development during the firm's "off-season" to prepare them to work on tax returns ranging in complexity from simple to medium, under the supervision and guidance of a senior level tax professional during the tax season. Feedback and guidance will be provided as part of the tax return review process that will enable the Tax Preparer Trainee to learn and grow as a tax professional based on the practical experience gained during the tax season.

### Role:

- **Training Program:** learning process will focus on the following responsibilities.
  - **Prepare Tax Returns:** complexity can range from simple to medium.
  - **Tax Planning:** assume a role in tax planning process.
  - **Preparation of Other Entities:** assume a role in the preparation process, including partnerships, trusts, and gift tax returns.
  - **Client Interactions:** to clarify questions and data for the preparation of tax returns and projections.
  - **Research Tax Issues:** answer client and Advisor queries.

### 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

**Job Description:**

To view the full job description go to <https://jgua.com/taxpreparertrainee>

**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.