John G. Ullman & Associates, Inc.

COMPREHENSIVE WEALTH MANAGEMENT SINCE 1978

JOB DESCRIPTION

Position Title:	Tax Preparer
Department:	Tax Services
FLSA Class:	Non-Exempt
Job Type:	Full Time
Standard Week:	40+ Hours Per Week
Reports To:	Vice President/Director of Tax Services

Job Summary: The Tax Preparer is an essential position in our company.

Working from the Big Flats Office, the Tax Preparer position will focus on the preparation of tax returns at various levels of complexity. Responsibilities will include preparing tax returns, performing tax planning services, and assisting in other functional areas of the Tax Services Department as needed.

The Tax Preparer will prepare tax returns ranging in complexity from simple to medium. Through training and mentoring, the Tax Preparer will learn to work on tax returns of increasing complexity as they gain more knowledge and experience.

The Tax Preparer will assume a role in tax planning. This will include preparation and review of quarterly tax projections to determine appropriate amounts for quarterly estimates and/or withholdings as needed to achieve the desired outcome in the future filing of tax returns. Assist in situations for clients to include research and presentation/communication of potential tax related opportunities

The Tax Preparer may also interact with clients to clarify questions and data for the preparation of tax returns and projections. Duties will include working proactively with Advisors and clients to maximize planning opportunities, as well as maintaining a good working relationship with clients and staff to enhance client satisfaction.

Job Duties
Prepare tax returns; complexity can range from simple to the most complex depending on experience.
Assume a role in tax planning. This will include preparation and review of quarterly tax projections to determine appropriate amounts for quarterly estimates and/or withholdings as needed to achieve the desired outcome in the future filing of tax returns. Assist in situations for clients to include research and presentation/communication of potential tax related opportunities.
Assume a role in preparation of other entities including but not limited to partnerships, trusts, and gift tax returns as assigned.
Interact with clients to clarify questions and data for the preparation of tax returns and projections.

Maintain a good working relationship with clients and staff to enhance client satisfaction.
Work closely and proactively with clients and Advisors in order to maximize planning opportunities.
Respond to federal, state, and local correspondence received on behalf of assigned clients.
Perform research in order to properly answer client and Advisor queries concerning taxes as needed.
Keep current on applicable tax regulations, changes in code, court rulings, etc. Communicate updates to key members of the staff involved in Tax Planning and Tax Return Preparations.

Required Qualifications:

- Excellent academic record, four-year college degree, graduate or advanced degree preferred.
- A minimum of 1-3 years of Tax Experience.
- 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.
- Must be willing and able to complete the requirements to receive the Enrolled Agent (EA) designation.
- Currently an Enrolled Agent (EA) would be preferred.
- CPA is strongly preferred.
- 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, experience with Microsoft Office (Word, Excel, PowerPoint, Outlook).
- Experience working with tax specific applications is required.
- Experience working with Pro System, BNA Income Tax Planner, Intelli-Connect, and other Tax Research Tools and Software.

Equipment, Software and Materials Used:

- Microsoft Office (Word, Excel, PowerPoint)
- Outlook (Email and Scheduling)
- Industry Specific Information Systems
- Tax Specific Applications (Pro System, BNA Income Tax Planner, Intelli-Connect)
- Information Databases
- Remote Access Meeting Applications.

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