

# TaxSmart Business Services

## Job Description: Level I Tax Preparer

### Minimum Requirements:

- High School Graduate with appropriate tax preparation education, or previous tax preparation work experience.
- Basic typing skills (40 wpm).
- Computer skills and experience with Microsoft Word, Excel and Outlook.
- Basic numeric keypad skills (7500 kph).
- Excellent people skills.
- IRS PTIN in good standing.
- Minimum 16 hours CPE annually.

### Major Job Responsibilities:

- Conduct client interviews using supplied checklist.
- Prepare basic individual income tax returns:
  - 1040EZ, 1040A, and 1040 with schedules EIC, A, B & basic D.
  - Georgia 500 full year resident returns.
- Check completed returns for errors.
- Answer basic tax questions for clients.
- Conduct research on tax questions/issues related to client returns.
- Confer with and assist co-workers on tax research.

### Other Responsibilities, as needed:

- Make client appointments.
- Assemble and collate completed tax returns.
- Answer telephone, direct calls, take messages.
- Greet arriving clients.
- Maintain tax return log.
- Other responsibilities as assigned.

### Description:

Our growing tax and accounting office provides high quality services to small businesses and individuals. A Level I Tax Preparer performs basic income tax preparation duties. It is essential that all preparers work within their experience and capabilities. If complications arise, we expect Level I preparers to seek assistance. He/she is expected to be an effective team member by supporting other office operations as needed. Tax preparers are encouraged to promote business growth through networking, handing out their business cards, telling friends, etc. TaxSmart provides the needed tax software, computer, office supplies, paper, internet connection, reference materials, workspace, etc. to perform the required job responsibilities.

Work hours are flexible, but during peak season the expectation is to work at least 5 days a week with occasional Saturdays and evenings. Continued employment will be on an as needed basis. Therefore, extended employment could be available beyond April 15 if there are sufficient extended tax returns yet to be completed.

All tax preparers are expected to maintain professional relationships with clients and other employees at all times. Integrity and honesty are minimum requirements for success. Therefore, all preparers are expected to abide by the standards laid out in IRS Circular 230.

Furthermore, tax prepares are expected to be inquisitive about tax laws and regulations. Asking questions, seeking advice, and conducting research are strongly encouraged. Thus, Level I Tax Preparers must stay current on appropriate tax law changes and updates through reading professional journals, IRS announcements, etc.

Likewise, all prepares must be able to communicate their tax knowledge to clients in a positive, helpful, easy to understand manner. We want our clients to say, "Thanks for helping me to understand."

**Reports to/Supervisor:** Kimberly Peykoff, EA

**Remuneration – Pay is on a commission basis as follows:**

- Base Pay = \$25 - 35/hour, paid semi-monthly.
- Accuracy Bonus = 0 – 5% of Tax Preparation Fees Collected. Paid October 31.
- Participation in company retirement plan, after 2 calendar years of service.
- Paid membership in NATP, NSTP, or NAEA.
- Continuing education reimbursement up to \$250 annually, with supervisor pre-approval.
- Paid membership in local networking group, up to \$250 annually, with supervisor pre-approval.

**About TaxSmart Business Services:**

A family owned and operated business which opened in 2002. Because of our passionate commitment to customer service and our focus on small business tax needs, the firm has continued steady growth. Therefore, we continue our strategy for providing excellent service and high-quality tax information. Business and personal tax return preparation continues to be the core of our success, while payroll and small business write up work keep us engaged year-round. Other components of our business include tax planning, IRS audit representation, tax collections and negotiations, sales tax returns, tax research, etc. Other areas such as financial advising, estate taxes, independent audits and reviews are not currently part of our business model.

Since 2007, we have been a RamseyTrusted ELP in Cherokee, Pickens, and north Cobb counties. We continue our relationship with Ramsey Solutions today.

**What makes TaxSmart Business Services different from other firms:**

- Attention to detail.
- Clients receive personal attention by a tax expert.
- Free pickup and delivery for monthly clients.
- Reasonable/competitive prices.
- Year-round services.
- Family owned and operated by Enrolled Agents.
  - Enrolled Agents are federally licensed by US Department of Treasury and IRS.
- Designated RamseyTrusted by award winning Ramsey Solutions.

**Application Procedure:**

- Submit resume with complete job history and 3 employment references to  
TaxSmart Employment Opportunities  
PO Box 280  
Holly Springs, GA 30142.

Or email:  
admin@taxsmart1040.com

- Three to Five applicants will be selected for initial interviews which will include brief computer typing and 10-key skills evaluation.
- Two or three applicants will be asked to complete a “sample” tax return at his/her own time and place with information provided by TaxSmart.
- Final applicants will be required to successfully complete the following prior to a final decision: pre-employment drug screening, criminal background check and credit check.

TaxSmart Business Services  
(770) 704-7777