

Tax Return Preparer Job Description (Seasonal)

Basics

- Must have 3 years of tax preparation (exceptions apply for accounting students attending college).
- Must be able to work 40 hours per week.
- \$25 to \$40 per hour. W-2'd. Seasonal thru April 15 (but if we like you, maybe we'll keep you).
- Periodic bonuses for obtaining goals well within your purview.

Watson CPA Group Benefits (for full time employees)

- Health insurance reimbursement thru HRA (makes it flexible for you)
- Group life insurance, disability insurance
- 401k plan (no matching currently, see expensive new office below)
- Flexible hours (core is 9:00AM to 3:00PM)
- Paid time off (16 days per year).
- Encouraged to work from home one day per week.
- Closed Fridays May thru November (yup, 3 day weekends all summer and fall).
- Small enough where you can make a difference.
- Brand new \$1.7M, 6,500 square foot standalone office opening in 2019

www.watsoncpagroup.com/office

If this fits, read on-

Who We Are

The Watson CPA Group is a small local accounting firm in Colorado Springs who only engages with small business owners (S Corps, Partnerships, PCs) and complex individual tax preparation. We take a consultative approach to our client engagements by offering unlimited consultation and a strong focus on planning. Tax return quality naturally occurs from periodic client interaction throughout the year.

We currently have five CPAs with one more obtaining licensure in the next 6 months, with a total of 21 full time employees. With our steady growth, we are in need of 6-8 seasonal tax return preparers who are business minded, want to learn and are willing to work hard. We will prepare about 1,600 tax returns during tax season, and about 2,200 total for the year.

Job Duties

You will be working with Tax Managers in preparing tax returns, connecting with clients to obtain data and clarify concerns, plus some odds and ends like tax projections.

Technical

Tax return preparers will have unfettered experience with-

Technician

3+ years of experience preparing 1040s, 1065s, 1120s and 1120Ss. Exceptions apply for accounting students attending college (we like students... unbaked clay eager to do it our way).

Business Consultant

Must be comfortable consulting with business owners on various topics especially business expenses / tax deductions. We will also review this during training.

Payroll Expert

We use ADP as our payroll processor for our business owners, especially S Corps. You must understand payroll and the journal entries surrounding payroll accounts. You will not be preparing and filing payroll tax returns, but you must be familiar. If you see \$20,000 leave a business banking account, you should be able to guess what is wage expense and what is payroll tax expense. This must come naturally or at least make sense to you.

Debits and Credits

You must be able to walk around QuickBooks and Xero, and be able to clean things up, generate financial statements, prepare a tax return and provide journal entries back to the client. Debits and credits must come naturally. Yes, they must also equal.

Penny Perfect

You must be able to determine materiality quickly, and be willing to accept less than desirable data from the client. **We are not here to audit the client's data, shame the client for having negative balance sheet accounts or crawl into their world with microscopes.** However, we are not here to file junk tax returns either. You need to be able to slide around on this spectrum depending on all the presented factors, risks and materiality.

If a small business does not have a balance sheet, you need to be OK with that and maintain this data inside of a tax return. Just because we love balance sheets doesn't mean everyone must.

Excel

Spreadsheets are only meaningful to the spreadsheet designer therefore you need to be able to generate a workpaper that someone else can follow without a lot of hand-holding.

Finding a Way to Say Yes

Accountants routinely say No without helping a client understand and eventually position themselves where a Yes is obtainable. We swim in grey waters with slivers of black and white, and while we are a self-policing industry we are also the client's advocate (as opposed to the government's).

That's the technical side. Now the HR side-

Human Resources

Our tax return preparers will have these humanistic qualities-

Playful

We are not dull or stuffy. We throwback beers and cocktails at 3:01PM on Fridays during tax season since drinking before 3:00PM is considered irresponsible.

We take the work that we do seriously, but we don't take ourselves seriously.

Hustle

If you approach everything with the same level of energy, this isn't the firm for you. Yes, we mess around and have a laugh. No, we not all business all the time. But... when there is a pile of crud on your desk, you need to find that tax gear and get a move on while maintaining accuracy, customer service and work attitude.

Approachable

You must be able to take the bad with the good. Accounting is inherently a negative business since all we do is look for things that are wrong. If you are looking for only kudos, hugs and rainbows, then this will be a tough environment. If you are a professional looking to improve your craft, then you'll fit right in. We want to do a better job tomorrow than we did today.

Procedure Oriented

We've created training manuals, procedures and checklists. While we leave room for anomalies and outliers, we need you to embrace the concept of standard operating procedures.

Mentor Skills

You must be able to mentor others on your team, manage their work flows and critique their work product. If you don't like having difficult conversations and prefer to hope things change naturally, this position might not be for you.

Timeline

We are looking to interview qualified candidates in October / November and hire for training at the end of January. Ideally.

Students

The Watson CPA Group takes pride in working with local schools to provide accounting students real hands-on experience. The AICPA and most school curriculums fail to teach future CPAs small business accounting. From cost accounting to managerial accounting to financial accounting, the examples and problems are usually big, fictitious firms.

We focus on one to two person small businesses, and as such as we are directly communicating with the owners to perfect education and change. Yeah, we have big clients but it is usually because they grew out of their garage, and kept us as their trusted advisors.

If you want tax experience including corporate tax preparation, the Watson CPA Group will give you valuable tools that you can leverage anywhere.

How to Apply

Download a huge 47-page fillable PDF and follow the instructions. Just kidding... it is only 2 pages of stuff we actually need you to think about today and another page of questions to prep for.

www.watsoncpagroup.com/TaxPrep.pdf

or...

www.watsoncpagroup.com/jobs

Seasonal Tax Return Preparer Job Application

Contact Info

Name _____

Address _____ City, Zip _____

Email _____ Cell Phone _____

Self-Rated Job Skills

QuickBooks	Excellent	Good	Average	Shaky
Excel	Excellent	Good	Average	Shaky
State Nexus, FBA	Excellent	Good	Average	Shaky
S Corp Biz Concepts	Excellent	Good	Average	Shaky
Payroll	Excellent	Good	Average	Shaky
Balance Sheet, Equity A/Cs	Excellent	Good	Average	Shaky
1120S	Excellent	Good	Average	Shaky
1065	Excellent	Good	Average	Shaky
Investment Concepts	Excellent	Good	Average	Shaky

Easy Questions

Do you know your credit score? Yes No

Do you have any derogatory remarks on your credit report? Yes No Don't Know

Do you have any background issues that we will find? Yes No

Were you ever fired or asked to resign from a previous job? Yes No

Application Questions to Answer

What is your threshold for figuring things out yourself versus asking for help?

What is your method of learning?

Why do you like tax return preparation as a profession? Did you lose a bet?

The accounting industry is generally negative. We look for things that are wrong first. How would you fit into this environment?

Instructions

Review the job requirements on our website at-

Email this application along with a single-page resume to **jobs@watsoncpagroup.com**. No calls. No faxes.

Interview Questions to Prepare For

How would you tell a team member that their work product was wrong? Or, not wrong, but could use improvement?

How would you tell a partner that his/her work product is wrong? Or that you have a better idea.

What type of office mates drive you nuts? Love?

Describe your work speed and how you manage your work flow versus quantity and deadlines.

As a professional, what parts of your craft would you want to improve? Why? And what have you done to do that in the past?

How do you respond to an “equal” reviewing and critiquing your work product?

What motivates you to do a good job? Internal? External?

What would you do if a client is lying to you, but you can’t prove it. For example, a mileage log appears fabricated- how would you handle that?

Tell us about a time when you argued with a client and afterwards you were wrong. Same situation, but with another co-worker or team member?

How are you a client / customer advocate?

Do you have an example of where you found a way to say Yes to a client when others said No?

Describe your organization skills? How would you stay on top of deadlines? What system do you use now for your personal life?

Why do you think procedures and checklists are important?

Are you afraid of making a mistake? What is your risk aversion?

How do you want to be corrected or critiqued?

How do you handle being told to do something a different way than you were taught or prefer?

What tax software have you used? What did you like about it? What did you hate?

What errors have you made on a tax return? On a financial report? Did you tell the client? How?

When preparing a tax return with a disorganized client, at what point do you think it is “good enough”? At what point would you recommend disengaging?