

WCG Tax Team Expectations / Path

	<u>"In-Training"</u> <u>Tax Accountant</u>	<u>Tax Accountant</u>	<u>"In-Training"</u> <u>Tax Supervisor</u>	<u>Tax Supervisor</u>	<u>Senior Tax</u> <u>Supervisor</u>	<u>Tax Manager</u>	<u>Senior Tax</u> <u>Manager</u>	<u>Partner</u>
Tax Prep	250	300	250	200	100	50	25	25
Tax Review	0	0	0	200	350	400	450	500
Tax Delivery	0	0	0	50	150	400	450	500
Tax Signing	0	0	0	0	150	400	450	500
Prep/ Review Blend	100% / 0%	100% / 0%	100% / 0%	50% / 50%	25% / 75%	10% / 90%	5% / 95%	5% / 95%
Total "touch"	250	300	250	400	450	450	475	525
Tax Plans Prep	100	150	150	150	50	50	50	50
Tax Plans Review, Delivery	0	0	0	0	150	200	200	200
Optional								
Committee Commitment	?	?	?	?	?	?	?	
Managed BAS Engagements	0	0	0	25	50	100	150	175
Managed TOE Engagements	0	0	0	25	100	200	300	350
Managed Revenue	0	0	0	137,000	331,000	662,000	993,000	1,159,000
Promotion	1 WCG tax season, 1 WCG plan season, plus discretion	3 tax seasons total, plus discretion	1 WCG tax season, 1 WCG plan season	3 tax seasons total, 1 WCG tax season, 1 WCG plan season, plus discretion	discretion	discretion	discretion	

In-Training Means New to the Tax Prep Team

In-Training Tax Manager is Very Rare