



CPA – Tax Specialist JOB DESCRIPTION

Status: Exempt

Revised Date: 12/11/2015

Location:

Branson

Eureka Springs

Harrison

Principle Responsibilities: This position is responsible for the overall office activities as well as client relationships within the assigned community. This individual will lead and manage multiple tax engagements to deliver quality tax services for our clients.

- Prepares and reviews various tax returns for clients in our various locations
- Works directly with clients and staff to develop tax plans and strategy
- Prices client work within corporate structure
- Prepares financial statements and other various accounting entries
- Represents clients with IRS, State, or other agency audits
- Assist with other offices when needed
- Performs other duties as required or assigned

Qualifications: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and Experience Requirements:

- High School Diploma or GED
- Associate's Degree
- Bachelor's Degree or equivalent from a four year college or university and/or 5+ Years of Professional Experience
- Master's Degree
- CPA or Enrolled Agent Certification

Training Skills, Knowledge and/or Experience: The ideal candidate should be proficient in Microsoft Office software and have the ability to successfully communicate with clients and fellow staff members. Experience with Ultra Tax software and QuickBooks is desirable. The candidate should also have the ability to sell and market services to prospective clients, as well as be exceptionally organized.

Supervisory Responsibility:

- No supervisory responsibility
- Provides guidance, leadership, or training to other employees (no direct supervision)
- Directly responsible for supervising non-exempt, clerical, or office administrative personnel
- Directly responsible for supervising exempt, professional, or technical employees
- Directly responsible for supervising supervisory, managerial employees

Language skills: Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one-on-one situations and to other employees in the organization.

Mathematical skills: Ability to calculate figures and amounts such as discounts, interest proportions, and percentages. Ability to apply concepts of basic algebra and geometry.

Reasoning Ability: Ability to define problems, collect data, establish facts, and draw valid conclusions.

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to sit, stand, and walk; use hands to finger, handle, or feel; reach with hands and arms. The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this position include close vision.

Work Environment: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate.

Organizational Structure

Job Title to which this position reports: Office Manager

Job Titles indirectly reporting to this position: Other staff assigned to office

Extensive Hours: Extended hours will be required during tax season.

Employee Signature: _____ **Date:** _____