



BARTLETT, PRINGLE & WOLF, LLP

CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

JOB DESCRIPTION

JOB TITLE: Tax Staff Accountant I

STATUS Non-Exempt

REPORTS TO: Tax Manager

Job Summary: Responsible for preparing tax returns of a more simple variety following routine procedures. Uses experience to build technical tax knowledge and ability. Actively seeks an understanding of tax issues and laws.

DISTINGUISHING CHARACTERISTICS

Firm Wide: Conducts oneself in a professional manner; reinforces Firm's core values through personal accountability; works with the highest degree of ethical standards, personal integrity, and honesty; shows respect and courtesy to co-workers; contributes to a positive work environment; supports community reputation and Firm core values through delivering quality client service; regularly demonstrates job commitment; supports Firm vision and associated decisions; works well as part of a team; communicates appropriately and effectively in business setting; works well under pressure and is able to meet established deadlines and balance competing priorities; makes decisions using common sense and sound judgment.

Self-development: Seeks out and incorporates feedback from others; views feedback as an opportunity to learn; responds positively to coaching and mentoring; shares concerns of issues with appropriate management staff; identifies own strengths and areas for improvement; learns from mistakes; is open to new ideas. Applies knowledge and skills through training and self-development activities; attends required and elective education programs; sets plans of action and follows through; seeks new responsibilities and challenges.

ESSENTIAL FUNCTIONS

1. Prepares basic tax returns
2. Prepares estimate tax payments for individuals and corporations
3. Prepares basic amended returns, personal tax projections, property tax returns, employee benefit plan returns, carryback returns, and payroll tax returns
4. Researches tax issues of minimal complexity
5. Responds to less complex IRS notices
6. Develops ability to identify ethical, independence and/or conflict issues; refers to management immediately
7. Utilizes and develops a basic understanding and working knowledge of various tax programs and of requisite software and internal work flow/procedures
8. Follows established business processes and practices
9. Maintains confidentiality in all client matters

10. Familiar with IRS Circular 230 Regulations Governing the Practice of Attorneys, Certified Public Accountants, Actuaries and Enrolled Agents Before the IRS and the AICPA Professional Code of Conduct

Client Service/Relationship

- 11. Minimal interaction with client during an engagement
- 12. Seeks an understanding of the client's business

Service Quality

- 13. Delivers client service in accordance with established service practices and standards
- 14. Produces quality work products in accordance with taxing authorities, GAAP, and firm policies and procedures
- 15. Checks accuracy of work for errors prior to submission for review

MANAGEMENT

Staff – None

Engagement

- 16. Understands expectations of assignment before commencing work
- 17. Communicates issues, ideas and/or concerns to appropriate management staff in a timely manner
- 18. Participates in engagements following established processes, prescribed deadlines and project budget (hours)
- 19. Follows up and closes open issues

Business Development

- 20. Pursues an understanding of the firm's products, service models, position in the marketplace, and vision and core values
- 21. Gains knowledge of appropriate internal contacts to refer business to

Community Involvement

- 22. Shows interest in and may engage in community events and activities, including networking and recruiting opportunities, firm-sponsored or otherwise

McGladrey Network

- 23. Pursues and gains an understanding of relationship with firm

QUALIFICATIONS

Education: B.A. / B.S. degree or equivalent from accredited university (Accounting or Business Economics Major preferred) or actively pursuing professional certificate from accredited school or university

Work Experience: None required

Technical Expertise: Demonstrates knowledge of basic technical tax requirements

Licensing: None required

SKILLS & ABILITIES

Communication: Demonstrates ability to effectively communicate with clients, co-workers, vendors, consultants or other business-related parties in a polite and respectful manner; communicates clearly and concisely via telephone, email, or in person; follows oral and written instructions; presents information and respond to questions; prepares reports and business correspondence; demonstrates active listening by asking follow-up questions.

Management Skills: None required

General: Demonstrates ability to multi-task, prioritize, manage time, and achieve deadlines; prepare and maintain accurate and complete records and reports; solve practical problems; interpret a variety of instructions given in written, oral, diagram, or schedule form; follow company policies and procedures; meet expectations of billable and non-billable work hours budget; accurately track and record work hours.

Tools & Equipment: Demonstrates ability to operate personal computers and tools (mouse, keyboard, monitor etc.); utilize appropriate software applications such MS Word, Excel, and Outlook, Intra/Internet tools (browser, etc.), ProSystem, Engagement and time-entry system; utilize office equipment such as calculator, printer, photocopier, scanner, and telephone; navigate Internet or Intranet sites.

Language & Mathematical: Demonstrates ability to read, analyze, interpret and apply general business periodicals, professional journals, technical procedures, and/or governmental regulations, guidelines, or other; apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

Physical Abilities: Has ability to sit; use hands and fingers, handle, or feel objects, tools, or controls; reach with hands and arms; talk and hear. Specific vision abilities include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

Work Environment: Well-lighted, maintains a controlled temperature and a moderate noise level

NOTE: These statements are intended to describe the general nature and level of work involved for this job. It is not an exhaustive list of all responsibilities, duties and skills required of this job.

It is the individual responsibility of every employee to maintain a current awareness and understanding of and to fully comply with the company's code of ethics, independence rules and quality control practices.

Employee Name

Employee Signature

Date

Supervisor

Date

Human Resources

Date