

JOB DESCRIPTION

JOB TITLE: TAX CLERK/RECEPTIONIST

Brief description

The position of a “Tax Receptionist / Tax Clerk” is a position that consists of performing basic clerical office tasks and overseeing and assisting with the daily activities of the tax office.

Tasks

Other Office Tasks:

- Assist with gathering and analyzing taxpayer information to assist with preparing tax returns;
- Answer questions and assist client with resolving audits or complaints;
- Comply with federal, state, and company policies, procedures, and regulations;
- Answer phones, greet visitors, schedule/confirm appointments, print and email copies, assist clients with refund and return status updates;
- Process client files: update return status, and file returns in appropriate filing cabinets;
- Operate 10-key calculators, computers with accounting software, and fax/copy machines to perform calculations, produce documents, and prepare or analyze information;
- Receive and record bank, cash, checks, and credit card payments received by clients;
- Give tax refund check to client using the company’s policy and procedures;
- Educate the client: Explain federal and state tax laws, regulations, policies, or procedures to individuals and companies;
- Report to Tax Manager any due diligence issues with tax returns or colleagues;
- Oversee the cleanliness of the office and organize the desk/office areas.
- Assist with keeping the office and surrounding areas clean and neat, which can include taking out the trash, cleaning the restrooms, and common areas.
- Perform all necessary task to assist the clients and office staff as needed.

Qualifications and requirements

- High School Diploma or the equivalent (GED /or at least 3 months clerical experience)
- Valid California Registered Tax Preparer License (Optional)

Competencies (in order of importance)

- Integrity- Job requires being honest and ethical.
- Attention to Detail- Job requires being careful about detail, thorough in completing work tasks, have the ability to give full attention to what other people are saying, and to actively look for ways to help people;
- Dependability- Job requires being reliable, responsible, and dependable, showing up to work, and fulfilling obligations.
- Independence- Job requires developing one’s own ways of doing things, guiding oneself with little or no supervision, and depending on oneself to get things done timely.

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- Analytical Thinking- Job requires analyzing information and using logic to address work-related issues and problems. Use logic and reasoning to identify the strengths and weaknesses of alternative solutions, and to manage one's own time.
- Cooperation- Job requires being pleasant with others on the job and displaying good-natured, cooperative attitude.
- Self-Control- Job requires maintaining composure, keeping emotions in check, controlling anger, and avoiding aggressive behavior, even in very difficult situations.
- Achievement/Effort- Job requires establishing and maintaining personally challenging achievement goals and exerting effort toward mastering tasks.

Working conditions

- This is an At-Will seasonal Tax Clerk position which usually last from January thru April and is either full time or part time. The hours and days of work are based on availability, seasonality, and need of company.
- Tax Clerk can be asked to work longer hours during peak season, and likewise, asked to leave early during slow times, or put on an extended leave during slow periods.
- Due to the nature of the tax preparation business being seasonal (January thru April), Guardian Tax Corporation normally does not hire Tax Clerk outside of the tax preparation season (May thru December) and the last day of work is normally the last day of tax season; However, Guardian Tax may depending on the need of the company hire outside of tax season during the months of May thru December.