

JOB DESCRIPTION

INDEPENDENT TAX PREPARER

Brief description

The position of a Independent Tax Preparer consists of gathering, analyzing, interviewing, and calculating taxpayer information records to prepare Income Tax Return. The Independent Tax Preparer is a seasonal contractor whose compensation consists of a commission rate ranging from 25% up to 40% per paid customer; and gross pay earned is reported on a form 1099-NEC.

Tasks

- Assist in preparing simple to complex tax returns for individuals and businesses:
- Interview clients to obtain financial and all necessary information on taxable income, deductible expenses, and allowances ensuring due diligence with tax preparation.
- Use all appropriate adjustments, deductions, and credits to determine the clients' least amount of legitimate tax.
- Advise clients on present and future financial and tax matters: Furnish taxpayers with enough information and advice to ensure correct tax form completion.
- Calculate financial and related information for the tax return: Compute taxes owed or overpaid, using adding machines or computers, and complete entries on forms ensuring compliance with all federal and state law requirements.
- Educate the client: Explain federal and state tax laws, or regulations to individuals and companies.
- Update professional knowledge: Comply and Consult tax law books, cases, IRS/CTEC policy and procedures, or bulletins to determine procedures for preparation of return.
- Assist client with resolving audits or reviews.
- Comply with federal and state guidelines, procedures, and regulations.
- Operate 10-key calculators, computers with accounting software, and copy machines to perform calculations, produce documents, and prepare or analyze information.

Qualifications and requirements

- Currently Registered with California Tax Education Council (CTEC),
- Have an IRS issued Preparer Tax Identification Number (PTIN)
- Obtain a current CA Tax Preparer Bond
- Certificate of IRS Due Diligence Training Module (obtain on IRS website)
- Pass Background Check
- Certificate of Completion for Bank Products Compliance Training

Competencies (in order of importance)

- Integrity- Job requires being honest and ethical.
- Attention to Detail- Job requires being careful about detail and thorough in completing work tasks.
- 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.

Apply at www.guardiantaxes.com/tax-pros

Independent Tax Preparer Job Description (1 Rev. 9/21)

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Working conditions

- This is an Independent Contractor Tax Preparer Seasonal position which usually last from January 1 thru April 15. Contractor has the flexibility of starting before January and continuing beyond April 15 if applicable.
- Work hours and days are set by the Independent Tax Preparer.
- Equipment, technology (lap-top etc.), and supplies are provided by the Independent Tax Preparer if working virtually and as needed.