Tax Preparer Job Description



What is a tax preparer?

A tax preparer calculates and prepares tax payments for individuals and businesses.

What does a tax preparer do?

Tax preparers obtain the client’s financial information in order to estimate tax payments and returns. They fill in tax reports and advise clients on tax management strategies.

Tax preparer job duties also include:

- Calculating tax credits, deductibles, and liabilities
- Reviewing if tax reports are in compliance with government tax rules and regulations
- Answering clients’ financial questions

What skills do you need to be a tax preparer?

A tax preparer usually holds a degree in Finance or Accounting. They have good knowledge of tax preparation software and MS Office. To become a competent tax preparer, it’s important to have attention to detail, and great mathematical and communication skills.

When crafting your own tax preparer job description, make sure to include these skills in the requirements.

JOB BRIEF

We are looking for an experienced tax preparer to join our company.

You’ll work closely with our clients and calculate their taxes including returns, liabilities, deductions, and expenses. You’ll review the accuracy of data on tax forms based on all tax rules and regulations. To succeed in this role, it’s important to have advanced mathematical skills and the ability to analyze complex data.

If you have relevant experience and want to join our team, we’d like to hear from you.

RESPONSIBILITIES

- Calculate tax payments
- Estimate tax returns, deductibles, liabilities, and expenses
- Prepare quarterly and annual reports
- Collect data from income statements and expense documents
- Complete clients’ tax documentation
- Review data on reports and detect possible errors
- Answer tax- and finance-related questions
- Research new tax trends and regulations
- Advise individuals and companies on tax strategies
- Ensure compliance with government tax rules

REQUIREMENTS

- Experience as a Tax Preparer or a similar role
- Good knowledge of tax preparation software
- Advanced MS Office skills (particularly in using Excel)
- Comprehensive understanding of government tax laws
- Excellent computational ability
- Effective verbal and written communication skills
- A degree in Finance or Accounting

SOURCE: https://resources.workable.com/tax-preparer-job-description