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Internship Opportunity

Tax preparation may be a great starting point for a student pursuing any coursework not just accounting.

This is an ideal opportunity for candidates exploring a career in financial services, taxation, accounting, or customer services.

What you can expect to gain & learn

- Assistance in receiving & sponsoring Tax Preparation Certificate from IRS (PTIN) / CA (CTEC)
- Working in a professional office via on-the-job experience assisting a Senior Tax preparer.
- Customer service skills: working with customers over the phone, email, virtual meetings or in person.
- Work alongside a team of diverse professionals with expertise in global taxation, emerging technology
- Acts a trusted advisor on tips and guidelines for maximizing returns and tax savings as the law
- Conducts a thorough in-person interview with potential clients about their income and expenses situation for the purpose of filing their tax returns.
- Using professional software, completes all related tax forms in accordance with policies, and in compliance with legislation and regulations.
- Furnishes taxpayers with sufficient information and advice to ensure correct tax form completion.
- Consults tax law reference materials to determine procedures for preparation of atypical returns.
- Answers questions and provides future tax planning to clients.
- Reviews financial records such as income statements and documentation of expenditures to determine forms needed to prepare tax returns.



Required Qualifications

High school diploma / Associate degree / college bachelor's degree.

Strong written and verbal English skills.

Good communication, interpersonal and customer services skills

Desire to build a career in tax preparation, accounting and related financial services

Strong skills in operating a computer and basic software programs - emailing, internet research, word processing and using spreadsheets is expected.

Basic math skills required.

Attention to detail and accuracy

Strong work ethic and customer service

Expertise in 2nd language - Spanish, Hindi, Chinese, Vietnamese or any other language

Coursework in accounting but it certainly will be a plus.

Job Type

Internship (3 month or 6-month option).

Hours/days of work are flexible to accommodate schoolwork.

Post internship the candidate may be offered a F/P time position of a Tax Preparer for 2023.

Contact: 510-357-5578 for details about the Internship program