Tax Preparer

(full-time, regular employment)

About AdvisorNet Financial

AdvisorNet Financial has been an innovative leader in the financial services industry for over 60 years. We provide the services and support independent financial advisors rely on to operate their firms efficiently and competitively. Over the years we've developed a vast network which allows us to provide our 300+ independent advisors access to the support services and industry partners that advisors in large institutions enjoy without having to be part of a large institution. For more information, please visit us at www.advisornet.com.

You will be a great fit if you enjoy working with people and data in a very dynamic, fast-paced environment. Our group requires people to be friendly, outgoing, and to thrive in an environment working on and in the business at the same time.

Responsibilities

AdvisorNet Financial is seeking a professional, goal-oriented, experienced Tax Preparer to join our team. The Tax Preparer is responsible for preparing complete and accurate State and Federal tax returns while delivering outstanding client service. In the off-season, you will work with the team to support both clients and financial planners in providing high quality tax planning and reporting in compliance with IRS requirements.

Key Areas of Responsibilities:

- Preparation of individual and small business income tax returns (partnerships and corporations), including necessary accounting, preparing and processing estimates and extensions
- Assist with IRS audit support as needed
- Act as the primary point of contact for tax software
- Help manage and develop tax policy
- Participate in income tax research and planning
- Track flow of work using internal systems
- Work with Financial Planner and Account Administrator to produce required reports and tax planning recommendations upon request
- Additional research projects as needed

Qualifications

- Enrolled Agent or CPA
- Experience with tax software is required (3-year experience preferred)
- Three (3) to five (5) years' experience in tax or accounting
- Take-charge person who is able to work well independently, but still be a team player
- Ability to meet tight deadlines and effectively handle stressful situations; and to juggle multiple projects
- Knowledge and application of Business Software including Microsoft Office Suite, CRM Client Database, Ultra Tax and/or other tax programs
- Exceptional client service and communication skills with a demonstrated ability to develop and maintain outstanding client relationships
- Ability to manage confidential financial data in a professional manner

Preferred Skills:

- Undergraduate degree or equivalent experience
- Financial industry experience

To apply: Please send your resume to hr@advisornet.com.

Disclaimer: This job description is only a summary of the typical functions of the job, not an exhaustive or comprehensive list of all possible job responsibilities, tasks, and duties. Responsibilities, tasks, and duties of the jobholder might differ from those outlined in the job description and other duties, as assigned, might be required.