



JD Financial

"Your Partner in Tax Prep"

Front Desk Support Staff

Front end reception and support staff individual needed. Reception and support will be on a per diem self-employed basis.

Duties will include but are not limited to:

- Answering phones
- Managing voicemail
- Reaching out to clients
- Scheduling appointments
- E-File maintenance
 - Record confirmation numbers on efile forms for state and federal returns.
 - Properly organize and store efile forms each tax season.
- Maintain client files
 - Organize and maintain client files according to current policy.
 - Periodically purge files and dispose of outdated information in accordance to IRS policy.
- General Office Responsibilities
 - Keep office neat and tidy
 - Maintain supply inventory
 - Keep client packets replenished
 - Other general responsibilities
- Office Security
 - Familiarize with the IRS Data Security policy and follow all steps to ensure client data security
 - Familiarize with office security policies and follow all steps to ensure office data security



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Tax Preparer

Small tax office is looking for a motivated person to prepare income tax returns.

Job Summary: Entry level tax preparer. Must be able to prepare tax returns using W-2, 1099, dividends, interest statements, income and expenses for a schedule C Self-Employment among other state and federal forms.

Responsibilities:

- Work directly with clients on an ongoing basis.
- Reports to Supervisor, Manager and Partners on a routine basis.
- This job description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change without notice.

Skill Requirements:

- Ability to perform several tasks concurrently with ease and professionalism.
- Ability to operate calculator, computer, and other general office equipment.
- Knowledge of accounting basics.
- Ability to communicate clearly and concisely, verbally and in writing, in English.
- Works with confidential client matters, requires ability to keep matters confidential.

Required Education & Experience:

- College course work in accounting, through intermediate accounting.
- Minimum of two (2) years' responsible accounting or full-charge bookkeeping experience related to a computerized accounting system, including accounts payable, accounts receivable, payroll, general ledger, and financial reports.
- Continued education and learning.

Job Type: Seasonal to Full time.

Salary: Compensation to be determined



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Tax Preparer

Growing accounting firm located in Victor, NY is seeking an accountant to handle client tax preparation and other tax-related tasks. Previous tax preparation, and technical proficiency is required.

Duties will include:

- Individual income tax preparation, assist in responses to notices
- Business schedule C, corporation, partnership, LLC, and estate returns
- New client onboarding
- Answering various client questions about bookkeeping and payroll.

Job Type: Seasonal

Salary: Compensation to be determined

Experience:

- Tax: 2 – 3 year experience desired
- Required: PTIN number
- Work Location: 10 East Main Street, Victor, NY
- Flexible schedule

- Monday to Saturday