

Description – Licensed Tax Preparers & Licensed Tax Consultant

Join us in our mission to “Take the Stress out of Taxes” by providing expert tax guidance to our customers using Drake Software; this includes helping customers prepare and submit their taxes. We are hiring Licensed Tax Preparers and Licensed Tax Consultants. You’ll bring confidence, tax expertise, and personal experiences to new client relationships that will empower and educate people, so they can lead better lives and get one step closer to financial freedom.

Our team of tax experts is growing, so once you apply to one role, we’ve got you covered. We will review your experience and consider your skill set for all open opportunities on the team.

Job Content/Scope:

- This is a seasonal client facing position providing Tax Advice, Tax Return Review and Preparation
- Assist Clients who are working on their tax return with tax advice, including return preparation and signature when required, and tax calculations
- Create high quality client interactions and experiences that instill confidence using deep customer empathy and client relation tools
- Utilize and leverage government websites, professional resources and team expertise to seek out and deliver the right answer to the client using everyday language
- Apply defined practices, procedures and company policies to troubleshoot and resolve tax advice and preparation client inquiries
- Document client interactions

Qualifications

- Must possess current Oregon licensing: LTP (Licensed Tax Preparer) or LTC (Licensed Tax Consultant) with strong tax preparation experience and extensive knowledge of tax laws
- Recent experience preparing federal and state individual 1040 tax returns using tax preparation software (2 or more years preferred)
- Audit experience a plus (IRS and state tax authorities)
- Proficient with technology; solid knowledge of computer operations and software
- Strong client service skills - ability to interact with clients through email and audio tools in a way that is professional, friendly and reassuring
- Excellent verbal and written communication skills
- Ability to work in a fast paced environment with minimal supervision
- Critical thinking, problem solving, and determination
- Bilingual (English/Spanish) communication skills (written & spoken) a plus