

Tax Support Supervisor Job Description

Team Objective

Historically, tax support was considered a part of client support. However, so many more functions and duties have been added over WCG's evolution to warrant a separate team entirely. The Client Support team's primary objective is being the front line to prospects and clients, either through the telephone, email or chat. The Tax team prepares, reviews and delivers tax returns. This is generally referred to as tax return production.

The Tax Support team provides support before production as a bridge between Client Support and Tax, and it also provide post-production support. The before-production tasks are assembling tax data into electronic binders and contacting clients for basic missing information. The after-production tasks are contacting clients for payment and efile authorizations and filing approved tax returns.

Tax Support is a very critical function to WCG's tax return production. Given our paperless environment, there is a much higher risk of tax return production not starting on time. or data being misplaced.

Tax Support also performs other support duties as detailed below.

Basics

▲ Must Have

- Pleasant demeanor with clients and your fellow team members.
- Excellent organizational skills and attention to detail.

▲ Must be proficient with a paperless environment and workflow management concepts.

▲ \$64,000 to \$72,000 total compensation. Bonuses, if offered, are considered in addition to total compensation.

Locations

▲ 2393 Flying Horse Club Drive, Colorado Springs, CO 80921

▲ 9777 Pyramid Court Suite 240, Englewood, CO 80112

▲ 300 North Main Street, Mitchell, SD 57301

Remote location as a new hire is generally not available for this position, but is available for experienced Tax Support team members.

Tax Support Supervisor Job Duties

You will be working with other Tax Support and Tax team members. Your duties include-

- ▲ Guiding WCG along the path of success,
- ▲ Promoting WCG culture, and encouraging excellence and high team morale,
- ▲ Providing feedback, concerns and recommendations to WCG leadership to continuously evolve Accounting Services into a better service line,
- ▲ Supervise Tax Support team members (direct reports) and its processes,
- ▲ Answering client phone calls and emails,
- ▲ Setting up new clients in various systems and databases,
- ▲ Filing and organizing electronic documents, including routing and notifying other WCG team members of new data,
- ▲ Creating electronic tax binders, entering certain information in client tax returns, and assisting with tax return production and workflow,
- ▲ Connecting with clients to gather essential information,
- ▲ Obtaining payment and efile authorizations from client,
- ▲ Filing tax returns including preparing and filing tax return extensions,
- ▲ Preparing and delivering certain tax plans to clients,
- ▲ Verifying end of year client data for payroll processing and similar duties, including filing certain 1099 tax forms,
- ▲ Printing and archiving electronic tax binders,
- ▲ Helping to keep the workflow moving, and
- ▲ Other tasks related to accounting, taxes and consultation.

Other Requirements

All salaried positions must work 2,000 hours annually / 12-month trailing period. See attached projected hour table by week as an example. Holidays and other office closures count towards the 2,000 hours (e.g., Thanksgiving would contribute 8 hours towards the 2,000-hour requirement). PTO and other employee-requested leaves do not count towards the 2,000-hour requirement. Please refer to the WCG Employee Handbook for additional information.

Career Path

The career path for Tax Support includes Supervisor. Tax Support is considered part of Operations which has Managers and a Director.

Tax Support team members can easily transition to accounting services, payroll processing or tax preparation, or other Operations roles within WCG (business development, workflow, etc). **Tax Support is a common entry point into WCG for college graduates and others who want a career in tax return preparation.** WCG does not limit any employee who wants to grow and develop, and eventually find their career path.

How to Apply

Please visit our website for current openings, company-paid benefits, a description of who we are and the “how do I get this cool gig?” series of steps-

wcginc.com/jobs