



## Revised job posting- Position: Tax Professional/Professional bookkeeper

### Job Description

This position is for a person who wants to gain experience in a small tax and bookkeeping firm and make an impact on the small business community! This position is also for a person that finds taxation an exciting part of accounting.

Start at part time 20 hours per week. This position will transition into full time during tax season and has the possibility to become full time at the end of 12 months of employment.

In addition to taxation, SMG Business Services, LLC needs a person with good bookkeeping skills, and a desire to work with small businesses and not just help them survive but thrive. A skill set for detail and research in tax law is a must. A desire to grow into a supervisory position and a good understanding of what it means to provide proactive and preventive services.

This individual must be ready to work in a supportive team environment, be ready to learn our systems, be able to work from home and our office, as well as to drive to service clients if needed and last but not least, have a goal-oriented attitude.

### Why should you want to work with us:

We are an exciting and fast-growing company. We are dynamic, fun, and friendly (like family). We provide a flexible work schedule with a mixed opportunity to work from home some days of the week. If you like what we do, you will have the opportunity to have a long-term position with us. As well as the opportunity to feel empowered by being part of the decision-making process and live up to your potential. You will be making an impact in the small business community.

### Company Info:

We are a fast-growing company, customer focused that provides cash flow management, bookkeeping, tax and other compliance and advisory services. We are located in Rancho Cucamonga, and we started our company in 2014. Since then, we have seen rapid growth in the last few years, even though the pandemic as our services were considered “Essential”. We aim to be as transparent as possible with our clients and employees and we encourage you to do the same. We are always looking for ways to improve and you will have the opportunity to give us suggestions as long as you are nice and respectful to your others.

***Our Mission:*** *To provide financial knowledge and expertise in a compassionate, proactive, and preventive way in order to support the business owner in the growth of their business.*

***Our Vision:*** *all business owners are empowered to be the best entrepreneurs they can be, through reliable, trustworthy, and accessible financial information.*

***Our values:*** *Education, Trustworthiness, Communication, Community, Stewardship, Generosity*

We need someone to help with the processing of the tax section of our business and to grow to manage the whole tax department. That’s where you come in. Please note, that if your goal is to work for a “Big Firm” we are not it. If you want to become a CPA, we are also not the company to work for.

### Summary of Responsibilities

As a Tax Professional, you will support all individual and business clients in their tax filing needs. This includes but is not limited to:

- Conduct client meetings in person or via video conference
- Interviewing clients to establish a relationship and to obtain the most updated information and documentation to complete an accurate tax return.
- Do tax research to apply tax law to the needs of clients
- Maintain education credits necessary to practice as tax professional.
- Be able to explain tax return in person or via vide call as well as recording the explanation to send to clients

### Technical Skills Requirements:

- Bilingual (English/Spanish)
- Preferred, Enrolled Agent & BS degree in accounting.
- As an alternative to a BS degree in accounting and the Enrolled Agent requirements.
  - Professional Bookkeeping Certification



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- Must become an Enrolled Agent within the first three months of employment.
- QuickBooks proficient a plus
- Must be tech and web-savvy.
- Proficient in the whole Office Suite: Excel, Microsoft Word, Power Point, etc
- Excellent communication skills in both languages (English and Spanish)
- Ability to manage projects from start to finish.

**Please note: we will provide all the required training but we need the knowledge**

### Soft Skills Requirements

- Honest
- Reliable
- Confidentiality
- Eager to learn
- Team Player

### Benefits:

- Flexible work schedule
- Hybrid: Virtual and Physical presence
- Opportunity for a long-term position
- Grow with the company
- Opportunity for full time position
- Work in a team environment
- Work in a family-like environment

### Ideal Candidate description:

- *Gets Stuff Done* - You take charge and get stuff done! You have a passion and an internal drive to make things happen! You find people who just like to talk and do nothing a bit irritating.
- *Figures Stuff Out* - You love to solve problems. You have the world at your fingertips - with the internet, you can figure almost anything out.
- *Loves Numbers* - Facts and figures are your jam. You don't need paragraphs and sentences, because the numbers tell you all you need to know. You are detail-oriented, and you make decisions on logic; when you buy a car, you have a detailed checklist of specs, makes and models.
- *Positive Attitude* - You don't let the little things get you down. You're upbeat, positive, cheerful, and excited about the future. You've even been known to let loose and have fun.
- *Growth-minded* - You're always learning, always growing. If you weren't, life would feel stale and boring.
- *Self-Starter* - You're self-motivated, happy working on your own with minimal guidance. You don't understand why some people just sit there when they haven't been told what to do.
- *Competitive* – not in a bad way, but striving to always do better. You're not doing it for the credit or praise; you do it because you know you can. Anything less would be boring.
- *Loves Responsibility* - You love to be in charge, and you want more responsibility. You get satisfaction in knowing you earned it.
- *Leads Others* - You know you can't do every little thing. Great generals have an army of specialists, and know their job is to empower others to do their best. You're great at setting objectives and holding people accountable.
- *Sees The Best In Others* - It kills you to see someone not living up to their potential. You can't help but encourage and mentor those around you. "You're such a teacher," is something you've heard a lot.
- *Assertive* - If you need something, you ask for it. Sometimes you have to insist, but you're always able to explain why you are asking for it. Every now and then you're wrong, and you're willing to concede.

### Pay/Compensation

Based on the ability and experience, compensation ranges start at \$18 to \$25/hour

### Additional Details

#### \*REQUIRED FOR REMOTE WORK

- Internet: Fast, stable, AND HIGHLY SECURE connection
- Work Environment: Be able to work privately (you're accessing confidential financial information) during business hours.

### Working hours

Start with part-time hours for the first few weeks. Schedule to be arranged according to each other's needs. Full-time position (40 hours/week) during tax season.

### How to Apply

Email us a cover letter to [smg-taxpreparer@summitecommerce.co](mailto:smg-taxpreparer@summitecommerce.co) with the words "I Love Taxes" in the heading. Additional steps will be provided once the cover letter is received.

**We can't wait to work with you!**