



Job Title: Tax Coordinator  
Department: Tax  
Reports To: IST Tax Manager  
Status: Full-time, Non-exempt

### **Summary of Responsibilities:**

Candidate must be a quick learner with the ability to multi-task. Work in a fast-paced environment and prioritize to meet tight deadlines. Work successfully in a team environment, assisting team mates as needed.

Tax return assembly processing, source document scanning. Able to organize, prioritize and meet deadlines in a timely manner. Assist with various tasks as related to the Tax Processes. Prepare overnight and courier packages as requested.

### **Requirements:**

- Flexible and reliable during busy times
- Strong attention to detail and proofreading skills
- Advanced skills with Microsoft Products, Adobe and Outlook

### **Essential Functions:**

- Assist in prioritizing and manage daily workflow, meeting imposed deadlines in a timely manner.
- Participate in meetings with Manager to discuss challenges and successes.
- Tax return assembly (i.e., print, assembly, tracking and delivery of returns daily)
- Day to day office duties (i.e., USPS mail and UPS package preparation, formatting/printing letters, reconciling tax software data bases, Tax Organizer preparation)
- Participation in IST team meetings and team building events
- Assist in preparation of all engagement letters for Tax Department
- Other duties as assigned – including but not limited to receptionist coverage, processing incoming/outgoing mail, daily kitchen maintenance, delivery of incoming packages, meeting preparation and set up and special projects

### **Education, Experience, and Skills:**

- Relevant work experience in CPA Firm
- Able to multi-task and work in a high volume, fast paced environment
- Advanced software skills CCH software, Practice, Document, and ProSystems

**Expectations:**

- Dependable and flexible with work schedule demands
- Respect and earn the respect of fellow team members
- Take ownership of identified processes and responsibilities
- Keep open communications with Manager
- Perform work with confidence and pride, follow through to completion
- Make informed decisions – discuss with manager when needed
- Work in a safe, clean and employee friendly atmosphere
- Work towards a professional development plan
- Willingness to assist/support other departments as needed
- Must be acquainted with all areas of the Internal Support Department MCM areas of expertise
- Knowledge of processes and software used in department
- Provide support that will allow our Partners, Principals, Managers and fellow team members to be successful
- Able to communicate with Internal Services Team (IST) group and support fellow team members.

**Working Conditions:**

- Ability to stand or sit for long periods of time
- Occasional heavy lifting
- Minimal hazards
- General office conditions

We are committed to providing equal employment opportunities to all employees and applicants without regard to race, ethnicity, religion, color, sex (including childbirth, breast feeding and related medical conditions), gender, gender identity or expression, sexual orientation, national origin, ancestry, citizenship status, uniform service member and veteran status, marital status, pregnancy, age, protected medical condition, genetic information, disability or any other protected status in accordance with all applicable federal, state and local laws.

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