



Job Title: Tax Associate
Department: Tax
Reports to: Senior Tax Associate/Tax Supervisor/Tax Manager
Status: Full-time
Level: Exempt
Last Updated: July 2021

Summary of Responsibilities:

A Tax Associate is responsible for organizing, analyzing, and adjusting client records to facilitate the timely and accurate preparation of required tax returns and forms.

Essential Functions:

- Organize client documents and records.
- Prepare and index workpapers.
- Analyze accounts and propose adjusting entries.
- Prepare trial balance, financial statements, and supporting schedules.
- Prepare basic individual and business tax returns.
- Draft correspondence as assigned.
- Perform and document research as assigned.
- Complete administrative duties timely (i.e., time entry and tasks list).
- Train interns or other team members as assigned.
- Set individual goals that support departmental and firm goals.
- Perform other duties as assigned.
- Develop working knowledge of tax law (business and individual)

Education, Experience, and Skills:

- Bachelor's degree in accounting from an accredited college or university
- Working knowledge of software utilized by MCM
- Complete assigned CPE or professional development courses as required annually.
- Working to obtain CPA license.

Expectations:

- Respect and earn the respect of fellow team members.
- Take ownership of identified processes and responsibilities.
- Keep open communications with manager and partners.
- Perform work with confidence and pride, follow through to completion.
- Dependable.
- Make informed decisions – discuss with manager when needed.
- Grow and learn from past mistakes.
- Work in a safe, clean and employee friendly atmosphere.
- Work personal/professional development plan.
- Must have flexibility with work schedule.



Working Conditions:

- Local and overnight travel may be required.
- Heavy overtime may be required during busy periods.

We are committed to providing equal employment opportunities to all employees and applicants without regard to race, ethnicity, religion, color, sex (including childbirth, nursing 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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